

# Using Xerox DocuShare 2.2

This User Guide provides basic information about DocuShare 2.2 and detailed instructions for the use of its features. For specific answers to common problems, see [Troubleshooting DocuShare](#) for quick answers.

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# 1 **Getting Started**

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## **DocuShare Overview**

DocuShare is a Web-based document management system that lets you easily store, access, and share information in a collaborative work environment. You can maintain information on the Web without having to understand hypertext markup language (HTML). With DocuShare, users can create their own accounts and add or delete information without the intervention of a Webmaster or site administrator.

The information that you store in DocuShare is organized using nested folders called **collections** in DocuShare. Collections may contain other DocuShare objects such as files, calendars, bulletin boards, URLs and other collections. Any of these DocuShare objects can appear in multiple collections at once and can be found quickly by using the various DocuShare navigation and search features.

Some of DocuShare's features are listed below:

- Users can create and maintain their own accounts and workspaces.
- You can download files stored on DocuShare to your computer. You can also upload files from your computer to the DocuShare server.
- You can mount the DocuShare site as a drive on Windows Explorer and manage files between the two if you use the Windows Client.
- You can create and store DocuShare objects such as document files, images, collections (folders), calendars, subscriptions, saved queries, bulletin boards, and URLs.
- You can set and maintain access to the files you create without the assistance of a Webmaster or site administrator.
- You can easily find new material on DocuShare with the **What's New** feature.
- You can keep successive versions of a file, track a file's revision history, and lock a file to prevent multiple simultaneous updates.
- DocuShare objects can appear in more than one location simultaneously.
- You can search for objects in DocuShare by date, text, object or document type, etc.

However, DocuShare's best feature is that you will find it easy to learn and use!

**Note: Throughout this manual, all directions to click links, buttons, or icons imply a single mouse click.**

**Additionally, all icons and buttons displayed in this manual reflect the default settings of DocuShare. Your DocuShare Site Administrator may change any of these icons or buttons to customize the appearance of your site. Contact your DocuShare Site Administrator regarding any changes due to site customization.**

## ***Platform Requirements and Options***

DocuShare may be accessed by any standard Web browser. The DocuShare software and associated files are located on a networked server, not your local computer. With the optional Windows Client software, DocuShare may be accessed from Windows Explorer instead of or in addition to using a web browser.

### **Platform Requirements**

You can access and use DocuShare from all computer platforms and operating systems for which World Wide Web access is available, including:

- Microsoft Windows (3.x, NT, 95, 98, and 2000)
- Macintosh
- Sun, Solaris and SGI (UNIX)

You must have network access to the World Wide Web to access a DocuShare server. You may encounter some additional usage limitations due to the Web browser you are using or restrictions imposed by documents created in third-party software formats. For example, Microsoft Word does not run automatically on UNIX.

### **Browser Requirements**

You can access and use DocuShare from a standard World Wide Web browser. Browsers known to work well with DocuShare are:

- Netscape Navigator 2.0 and above
- Microsoft Internet Explorer 3.0 and above

Other browsers may be used but must support tables, "client-side cookies" for login, and the use of third-party helper applications or "viewers" for display of additional content format types such as word processing, spreadsheet, or presentation files.

### **Windows Client**

If you use Windows 95, Windows 98, or Windows NT 4.0, you can mount DocuShare as a drive on Windows Explorer and manage files in DocuShare as if they were within Explorer (see Chapter 11, [DocuShare Windows Client](#)).

### **Uploading Files**

DocuShare enables you to upload files from your computer to the DocuShare server, where they are indexed and managed. File-upload enabled browsers (such as Netscape Navigator 2.0 and above, or MS Internet Explorer 4.0) allow you to use your existing browser for all file upload functions.

To upload files with browsers that do not support the file-upload standard, such as Microsoft Internet Explorer 3.0, you **must** install the **DocuShare File UpHelper** application on your personal computer. The DocuShare UpHelper application provides the ability to drag-and-drop files from your computer's file management system and to upload multiple documents at one time. See the section below [DocuShare UpHelper Application](#) for installation instructions.

**Note:** The DocuShare UpHelper application is designed for use only with MS Windows-based systems. It is not available for the MacOS or UNIX-based systems.

## **Configuring Your Browser**

To use DocuShare successfully, you **must** adjust your browser's configuration settings. Those adjustments are:

- [Disable Proxies](#)
- [Enable page updating \(set the cache attribute\)](#)
- [Check your Helper Application settings](#)

You must also be sure your browser can accept "**cookies**." Some browsers will allow users to disable this feature. For successful use of DocuShare, your browser **must** accept "**cookies**." See your Site Administrator for more information on cookies.

In addition, if your browser does not support the file-upload standard, you must also install the [DocuShare File UpHelper Application](#).

### **Disabling Proxies**

In many corporate networks, a barrier, or firewall, is set up on an internal network (or Intranet) to restrict the information that flows between the company computers and other external networks (the Internet). Limited Internet access is provided by a **proxy** server, which sits on the firewall and provides a pipeline to the Internet. When you use a proxy to access a DocuShare server that is already on an internal network (or Intranet), you are essentially going out beyond the firewall and then coming back in **again** to the network.

For the most efficient network response, the preferred method for using DocuShare is to access the DocuShare server directly through your internal network, therefore bypassing the proxy server. To do this, you must **turn off proxy access** from the internal network domain. For example, if your DocuShare server is located in the network domain **sales.acme.com**, you should configure your browser to **not** use a proxy for the domain **sales.acme.com**.

**Note:** If you do not turn off proxy server access settings as described, you may encounter problems while uploading files to the DocuShare server. Some older proxy servers do not handle binary file uploads correctly. In that situation, the file uploading procedure may appear to complete successfully to the user, but no file will appear on the DocuShare server.

<b>Browser</b>	<b>Action</b>
Netscape Navigator (4.x and 5.x for Win95/Win98/NT)	<ol style="list-style-type: none"> <li>1. Go to <b>Edit Preferences   Advanced   Proxies</b>.</li> <li>2. Click <b>Manual Proxy Configuration</b>; then click <b>View</b>.</li> <li>3. Type the name of the DocuShare server's domain (e.g., <b>sales.acme.com</b>) in the space for Exceptions.</li> <li>4. Click <b>OK</b> to return to the Preferences window. Click <b>OK</b> again to return to the browser window.</li> </ol>
Internet Explorer (4.0 for Win95/Win98/NT)	<ol style="list-style-type: none"> <li>1. Go to <b>View   Internet Options   Connection</b> and hit Advanced button.</li> <li>2. In the input field for "<b>Do not use proxy server for addresses beginning with,</b>" type the name of the DocuShare server's domain (e.g., <b>sales.acme.com</b>).</li> <li>3. Click <b>OK</b> to return to the Options window.</li> </ol>

Internet Explorer  
(5.0 for  
Win95/Win98/NT)

1. Go to **View | Internet Options | Connection** check the box for “**Bypass proxy server for local addresses**” then press the **Advanced** button.
2. In the input field for “**Do not use proxy server for addresses beginning with,**” type the name of the DocuShare server's domain (e.g., **sales.acme.com**).
3. Click **OK** to return to the **Internet Options** window and then click **OK** again.

### Setting the Cache Attribute

Most browsers provide caching mechanisms that store Web pages on your local disk and then retrieve the local files when you re-access the page. This can significantly increase browsing speed and reduce network traffic. However, because DocuShare pages are dynamically created and change frequently, you should configure your Web browser to **not** use a local disk cache when it connects to your DocuShare server. This will ensure that you always have the latest and "freshest" version of the DocuShare pages.

**Note:** If you do not adjust your cache setting, you may not see recent additions to a collection or may not even appear to be logged in. Although hitting the **Reload** or **Refresh** button on your browser will renew your view of the page and correct this situation momentarily, adjusting your browser's cache options will prevent you from constantly reloading pages manually.

Browser	Action
Netscape Navigator (4.x for Win95/NT)	In <b>Options   Network Preferences   Cache</b> , set <b>Check Documents</b> to “ <b>Every Time</b> .”
Netscape Navigator (5.x for Win95/NT)	In <b>Edit   Preferences   Advanced   Cache</b> , set <b>Check Documents</b> to “ <b>Every Time</b> .”
Internet Explorer (4.0 for Win95/NT)	In <b>View   Internet Options   General   Temporary Internet Files</b> , click the <b>Settings</b> button and set to “ <b>Every visit to the page</b> .”
Internet Explorer (5.0 for Win95/NT)	In <b>View   Internet Options   At General</b> tab, press <b>Settings</b> button under <b>Temporary Internet Files</b> , set <b>Check for newer versions of stored pages</b> to “ <b>Every visit to the page</b> .”

### Using Helper Applications

DocuShare only provides a repository for your files. It is actually your Web browser software that determines how a file that you download from DocuShare is handled.

All Web browsers automatically interpret and display pages that have been created in HTML. However, Web browsers do not automatically display other proprietary formats, such as

Microsoft Office applications, PDF, and so on. When a browser retrieves a file with a file format that it cannot interpret, the browser uses a separate *viewer* to display that file. The viewer can be either:

- A **helper application**, such as Microsoft Word, which may launch inside or outside of the browser window, or
- A **plug-in**, which launches inside the browser window.

A **helper application** is a particular application such as Word, PowerPoint, Excel, or the Acrobat Reader, which is automatically launched to display the selected file. For example, when accessing a Word file, if your browser's helper application is properly configured, your Web browser will automatically start Microsoft Word and use it to display the Word file.

A **plug-in** is a software program that extends the capabilities of your browser in a specific way, giving you, for example, the ability to play audio samples or view video movies from within your browser. Plug-ins are primarily used for multimedia-type applications.

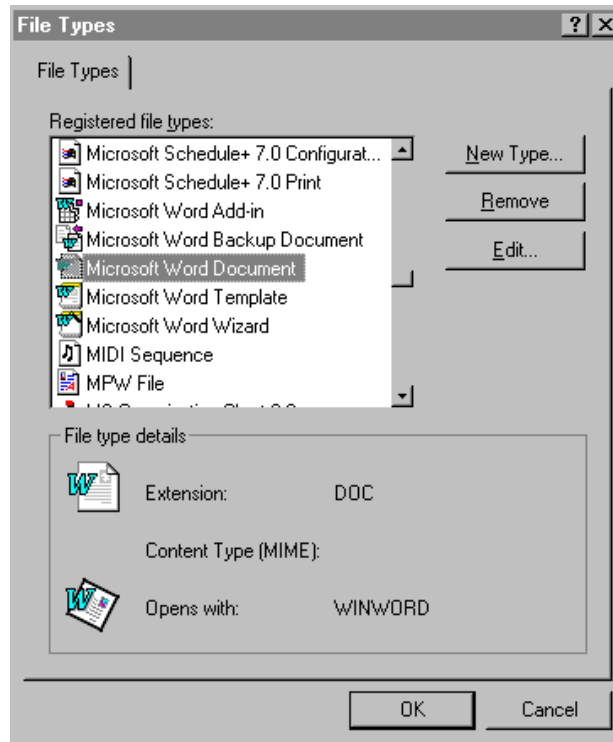
**Note:** If your browser is not configured for a particular helper application, most newer browsers will display a dialog box to help you to make these settings each time you encounter an unrecognized file type. This is much easier than the manual configuration process described below and should be used whenever possible.

### Manual Browser Configuration of Helper Applications

If necessary you may configure your browser manually. Use the following procedures to set up the helper applications for Microsoft Word, Excel, and PowerPoint and the Adobe Acrobat Reader. The process to configure your browser for other file types is similar. Contact your local Site Administrator for the correct MIME type and subtype settings for your DocuShare server.

Browser	Action
Netscape Navigator (4.x for Win95/NT)	<ol style="list-style-type: none"> <li>1. Go to <b>Options   General Preferences   Helpers</b>. (For Netscape 4.0, go to <b>Edit   Preferences   Navigator   Applications</b>.)</li> <li>2. Check to see if the following file types are listed.  <i>For Word:</i> application/msword  <i>For Excel:</i> application/ms-excel  <i>For PowerPoint:</i> application/ms-powerpoint  <i>For Adobe Acrobat:</i> application/pdf  You may have to scroll to find the file type you are looking for.</li> <li>3. If the file type you want is listed, select it. If the file type you want is not listed, click <b>Create New Type</b> and type <b>application</b> for the File/MIME Type. For the <b>Subtype</b>, type one of the following, depending on the application you are setting up:  <i>For Word:</i> <b>msword</b>  <i>For Excel:</i> <b>ms-excel</b>  <i>For PowerPoint:</i> <b>ms-powerpoint</b>  <i>For Adobe Acrobat:</i> <b>pdf</b></li> </ol>

4. In the File Extensions box, type the appropriate file extension(s) for the associated application:  
*For Word: **doc, dot***  
*For Excel: **xls***  
*For PowerPoint: **ppt***  
*For Adobe Acrobat: **pdf***
5. If Launch the Application is not selected or the application's icon is not present, do the following:
  - Click **Launch the Application**.
  - Click **Browse** and select the appropriate application: Word (WINWORD.EXE), Excel (EXCEL.EXE), PowerPoint (POWERPNT.EXE), or Adobe Acrobat Reader (ACROREAD.EXE or ACRORD32.EXE).
6. Repeat steps 3 - 5 for each helper application you want to set up.
7. Click **OK** to exit. In Netscape 2.0, also click **Save Options** on the Options menu.



## DocuShare Client Applications

### DocuShare Windows Client

The DocuShare Windows Client is an application that allows you to access and manage DocuShare files from within Windows Explorer. Once installed and mounted ([see Installing the](#)

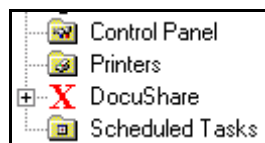
[DocuShare Windows Client](#)), DocuShare will show up as another drive on your regular Explorer tree structure. Using the Windows Client, you can access and interact with DocuShare just as you would with your local or network drives. For example, you can view the contents of DocuShare collections, open and edit files, copy files to and from (or within) DocuShare by dragging and dropping, and even use a combination of Explorer and the web interface to manage files. For further information, see Chapter 11, [DocuShare Windows Client](#). You can also access DocuShare files from within your editor applications (e.g., Microsoft Word) using the ODMA Client to check documents in and out of DocuShare. See Chapter 12, [DocuShare ODMA Client](#). In addition, desktop scanning is supported with the PaperPort Link to DocuShare within the Visioneer PaperPort Desktop. See Chapter 13, [PaperPort Link to DocuShare](#).

**Note:** You must have either Windows 95, Windows 98, Windows NT 4.0 or higher to use the DocuShare Windows Client.

### **Installing the DocuShare Windows Client**

#### **To install the Windows Client:**

1. You can get the Windows Client by going to the **Help** section of DocuShare. From there, click on **DocuShare Windows Client**. Follow the directions: Select your operating system (Windows 95, Windows 98 or NT 4.0), and then download the installation file and save it to a temporary location on your computer.
2. Select the downloaded installation file and double-click on it to initiate the installation. This file is a self-extracting file. The installation process will start. It will also prompt you for a location to install the Windows Client files, usually C:\Program Files\Xerox\DSClient. If that directory does not exist, the installation program will create it automatically. Optionally, you can select browse to choose where you want to install the Windows Client files.
3. Follow the rest of the on-screen dialog boxes to complete the Windows Client installation. The ODMA Client installs as part of the Windows Client and works in conjunction with the Windows Client. You can disable the ODMA Client if you wish: see [Configuring Options](#) in Chapter 11.
4. When you restart your computer (as prompted by the on-screen dialog box), you will see the DocuShare icon show up in the Windows Explorer tree diagram:



### **DocuShare UpHelper**

The **DocuShare File UpHelper Application** is a Windows application that enables file uploading to DocuShare for older Windows systems. It provides support for users of browsers such as Internet Explorer 3.0, which do not support the file upload standard. The maximum number of files you may upload at a time using this helper application is 100.

Netscape Navigator 2.0 and Microsoft Internet Explorer 4.0 support the file upload standard; however, they only allow the upload of one file at a time. If you are using either of these browsers and anticipate uploading multiple files during a session, you may also want to install UpHelper or the DocuShare Windows Client.

**To use UpHelper, you must:**

- Download and install the application from your DocuShare server's Help page.
- If necessary, configure your browser to use the UpHelper application as one of its recognized helper applications. (This will normally occur automatically during installation.)
- Edit your DocuShare User properties to indicate use of the Upload Helper application. See “[DocuShare Users](#)” in Chapter 2 for information on this setting.

**Note:** The DocuShare UpHelper application is designed for use only with MSWindows-based systems. It is not available for the MacOS or UNIX-based systems. Because it is designed for older systems, support for the DocuShare UpHelper will be discontinued at the end of 2000.

**Installing the DocuShare UpHelper Application**

**To install the UpHelper Application:**

1. You can get the DocuShare UpHelper Application by going to the **Help** section of DocuShare. From there, click on **File-Upload Helper Application**. Follow the directions: Select your operating system (Windows 95, NT 4.0, NT 3.x, or Windows 3.x) then download the installation file and save it to a temporary location on your computer.
2. Select that installation file in your file management system and double-click on it to initiate the installation. This is a self-extracting file. The installation process will start. It will also prompt you for a location to install the UpHelper files, usually C:\DSUpHelper\. If that directory does not exist, the installation program will create it automatically.
3. The UpHelper installation program will detect which browser you are using (Netscape or Internet Explorer) and will configure your browser to use UpHelper. If you have both Netscape and Internet Explorer installed on your machine, the installation program can configure both browsers during this process.
4. Follow the rest of the on-screen dialog boxes to complete the UpHelper installation.

**Manually Configuring the Netscape Browser to Use UpHelper**

Although the UpHelper installation process will configure both Netscape and Internet Explorer to use the UpHelper application, in case of any problems, please refer to these directions for manually configuring the UpHelper to work with the Netscape browser.

**Required settings for configuring UpHelper to work with Netscape Navigator 3.0:**

1. Go to **Options | General Preferences | Helpers**.

2. Click **Create New Type** and fill in the two fields:

- **Mime Type:** application
- **Mime SubType:** x-send-docushare-files

Select **OK** to exit the dialog box.

3. Fill in **File Extensions:** dfu.

4. In the **Action** area, select **Launch the Application**.

5. Click on the **Browse...** button; locate and select the UpHelper application on your computer, for example: C:\DSUpHelper\Uphelper.exe.

6. Select **OK** to exit the Options dialog window.

## 2 **Becoming a DocuShare User**

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## **Overview**

DocuShare is a web-based document management system that allows users to store, access and manage information and files in a *Community –Maintained*<sup>™</sup> repository using a standard web browser or Microsoft Windows Explorer. Anyone who can access the server can download existing files and upload new files. They can also create and manage storage areas, group calendars, bulletin boards and other tools to facilitate group communications over a network.

A DocuShare site is composed of **objects** that are presented in the familiar model of nested directories or folders. These folders are called **collections**. Any file, collection, subscription, calendar or bulletin board created in DocuShare is a unique object with an object identifier called a **handle**. That unique identifier stays with the object forever, even when you edit or move it. You will find in time that this comes in handy when setting bookmarks or sending people pointers to your information.



A typical collection page in the default configuration, entitled “Millennium,” is shown above.

Your site administrator has the ability to customize the DocuShare site and configuration significantly, so remember, appearance and/or behavior of the site could be vastly different depending on what is required or desired by users.

Since it is impractical to cover all possible customizations, this User Guide will focus on general usage and supply default configuration examples. If your DocuShare site is highly customized, your site administrator may have a personalized user guide describing functionality of the tailor-made site.

In the default configuration (and most customizations), DocuShare pages will have a **navigation bar** at the top to provide access to general DocuShare utilities such as accounts, search, and help. Below that is the collection's title and summary. The contents of the Summary field will appear below the object's title on the page in which the object appears. Below the title and summary are the pull-down menus, which offer various options. The **Edit Menu** allows you to view and/or change certain aspects of the collection, or even delete the collection (Writer or Manager access is required for some options). The **Add... Menu** allows you to add content to the collection: files, URLs, bulletin boards, calendars, etc. (Writer access is required to add content.)

Below the pull-down menus is the collection's **Appears In** list, which provides pointers to all collections in which this collection appears. Any DocuShare object may appear in more than one location at the same time. Finally, there is a list of the collection's content, which may include other collections, or files, URLs, calendars and bulletin boards.

DocuShare pages contain a variety of links that make navigating through the site easy. A few common usage tips include:










- Click the name of an object to view the object.
- Click the collection's folder icon or the collection's title to open a collection.
- Click the **Appears In** link to go up a level in the hierarchy.
- Click the object's **Services** icon to see more information about an object. The displayed **Services** page lists the properties of the object, and an **Edit pull-down menu**, which provides further options for that object.

There are other navigation methods, such as a table-of-contents view and an extensive search utility, to help you get around the DocuShare site. No matter which combination of navigational tools you use, you will find your way easily around a DocuShare site.

## DocuShare Objects

As a document management and sharing environment, DocuShare provides a rich set of services and utilities for defining, editing, and tracking **File** objects. You can store and manage files regardless of their format. For more information on files, see Chapter 5, [DocuShare Files](#).

The object types you can create from within DocuShare are listed below:


DocuShare Icon	Object
	<b>User</b> – A registered user of DocuShare.
	<b>Group</b> – An assembly of one or more DocuShare users and/or other groups.
	<b>Collection</b> – The DocuShare equivalent of a folder.
	<b>Calendar</b> – An online Calendar. Calendars also hold <b>Event</b> objects.
	<b>URL</b> – A World Wide Web address (URL).
	<b>Bulletin Board</b> – An online Bulletin Board. Bulletin Boards also hold <b>Bulletin</b> objects.
	<b>Saved Query</b> – A saved search query that will display the results of that query each time it is opened.
	<b>Subscribe (Immediate)</b> - Allows users to subscribe to DocuShare content and be notified by email <i>immediately after</i> changes occur.
	<b>Subscribe (Daily)</b> - Allows users to subscribe to DocuShare content and be notified by email when changes occur via <i>daily summary reports</i> .



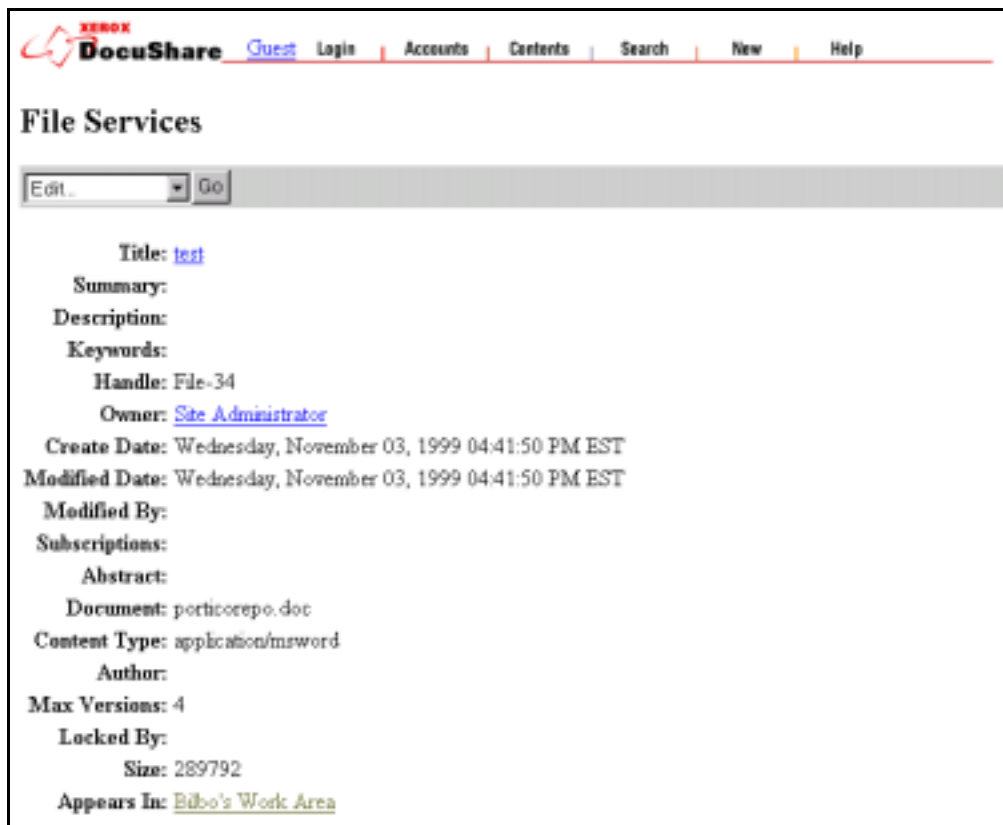
**Subscribe (Weekly)** - Allows users to subscribe to DocuShare content and be notified by email when changes occur *via weekly summary reports*.

**Note:** Collections, Calendars, and Bulletin Boards are considered **container** objects because they can hold other objects.

## Object Services

Every object in DocuShare has **Services** that are available to you, such as viewing/editing object properties, editing access permissions, deleting the object, or changing its location. Some objects may have extra services available (e.g., locking and versioning for files). To access the services for any object, click on its **Services** icon , located to the right of the object title in a collection listing.

When you click on Services, the **Services Page** will appear, listing the properties for that object and an Edit pull-down menu, which provides access to other options. A typical Services page for a DocuShare file is displayed below.



The screenshot shows the DocuShare interface. At the top is a navigation bar with links: Guest, Login, Accounts, Contents, Search, New, and Help. Below this is the 'File Services' section. It features an 'Edit...' dropdown menu and a 'Go' button. The main content area displays various properties for a file named 'test':

- Title: [test](#)
- Summary:
- Description:
- Keywords:
- Handle: File-34
- Owner: [Site Administrator](#)
- Create Date: Wednesday, November 03, 1999 04:41:50 PM EST
- Modified Date: Wednesday, November 03, 1999 04:41:50 PM EST
- Modified By:
- Subscriptions:
- Abstract:
- Document: porticorepo.doc
- Content Type: application/msword
- Author:
- Max Versions: 4
- Locked By:
- Size: 289792
- Appears In: [Bibo's Work Area](#)

## Properties

Properties, as shown above, further describe the object by giving information, such as title, summary, description, owner, date of creation, date of last modification, and keywords. Some

properties (e.g., Title) may be edited if you have the proper permission, while others (e.g., Creation Date) are fixed.

To change or edit properties, select **Edit Properties** from the **Edit** pull-down menu on the Services page, and the **Edit [Object]** page will appear. Make changes as you wish and then press the **Apply** button; the **Services** page will reappear showing the property changes you made. Fixed properties (e.g., Creation Date) will not show up on the **Edit [Object]** page.

You may view or edit the properties of container objects without clicking on the Services icon by selecting **View Properties** or **Edit Properties** from the **Edit** pull-down menu. You must be inside the container object to do this (e.g., viewing a collection page). Regardless of how you access the View Properties/Service page of an object, you need Writer or Manager level access to edit properties.

### **Permissions**

Access depends on the **permission** status you have in regards to the object. The owner (creator) of an object – not the site administrator – assigns **permissions** for that object. **Permissions** establish security for the DocuShare site. Differing levels of permission or access allow various privileges regarding DocuShare objects. For example, if you have **Reader** access, you can view an object but not modify it or its properties. For more information on permissions, see Chapter 3, [DocuShare Permissions](#).

## ***Navigating a DocuShare Site***

### ***DocuShare Home Page***

The DocuShare default home page provides the initial **entrance** to your DocuShare site and contains links to one or more top-level or "root" collections that contain other sub-collections. There are also links to the accounts, the login screen, the site map, and information **About DocuShare**. Your DocuShare Site Administrator can easily customize the DocuShare home page, so your server's home page may be different. Contact your Site Administrator for information on the customization of your DocuShare site.

The home page also features the [What's New in DocuShare](#) feature, which helps you to find out what has been added to DocuShare recently.

### ***DocuShare Collection Pages***

DocuShare uses a series of collections and sub-collections to organize content. These collections are connected together through root collections in much the same way other file management systems use root folders and sub-folders to organize content. One important difference is that any DocuShare object may exist within more than one collection at the same time, thus leveraging the Web's powerful hypertext capabilities.

Each collection in DocuShare has a separate page. The example below shows some of the basic elements found on every collection page. Customization may change the appearance of a collection page to create a distinct look; however, these elements are typical:

1. A **Navigation Bar** with links to commonly used features, including Login, Accounts, Contents, Search, New, and Help.
2. The **Title** of the collection.
3. An optional **Summary** of the contents of the collection. An optional **description** can also appear below this summary. The contents of the Summary field will appear below the object's title on the page in which the object appears.
4. A **menu bar** with pull-down menus that have selections for the operations that you can perform on the collection, including deleting the collection, viewing the properties, and adding content.
5. The **collection content**. This content includes other DocuShare objects such as additional collections, files, URLs, calendars, or bulletin boards.

Like collections, the site administrator can customize objects, but the information listed below for each object is typical of what will appear:

- An object icon
- Title of the object
- Summary information about the object (if any)
- The owner of the object
- The creation date (date object added to DocuShare)
- The numbers of items (collections only) or the file size (files only)

**To open a collection**, just click on its title or folder icon. The collection page will open. Similarly, DocuShare **calendars** and **bulletin boards** open by clicking on their title or icon.

Other objects perform differently when clicked.

- When you click on a URL object, you will move (within your browser window) to the indicated URL link.
- When you click on a file icon, one of two things may occur:
  1. If your browser is configured to use that file's native applications as a helper application, the helper application will open and your file will be displayed.
  2. Other file types, such as executable files (.exe) or compressed files (.zip) may display a dialog box to allow you to save them to your hard drive.

**How these events occur is determined by your browser settings, *not by DocuShare*.** For more information on helper application settings, see [Helper Applications](#) in Chapter 1.

**Note:** Having your helper applications configured properly is **essential** for successful use of DocuShare.

## What's New

One of DocuShare's most popular features is **What's New**. **What's New** allows you to see recent additions to DocuShare over a time frame that you can select –the last hour, today, the last 2 days, the last 3 days or the last 4 days. The extent of the listing that you see is dependent upon your logged-in status and the access permissions of the newly added object.



### To find out what's new in DocuShare:

1. In the **What's New** area on the DocuShare home page, select a time frame from the pull-down menu. Time frame selections are: in the last hour, today, in the last 2 days, in the last 3 days, or in the last 4 days.  
**Note:** You can also select **New** in the navigation bar at the top of any page to access a similar listing. This may restrict the What's New listing to new objects in the current collection.
2. Click **Go**. A list of new and modified DocuShare objects appears. Only those objects for which you have at least Reader access appear.

## DocuShare Navigation Bar



The default **navigation bar** appears at the top of each DocuShare page. It provides the following links:

- **DocuShare** or **site** icon – Links to the DocuShare site home page (unless you are already on the home page). May appear as a different icon unique to your DocuShare site.
- **Logged-in User** – Links to the logged-in user's services page.

- **Login** – Links to the **DocuShare Login** page, where you can enter your DocuShare user name and password to log in.
- **Accounts** – Links to the **DocuShare Community Registry** where you can log in, create a DocuShare user account, create a user group, list all registered DocuShare users and groups, or search for a registered DocuShare user.
- **Contents** – Displays a table-of-contents view of the entire site when selected from the home page. If selected while in a collection, displays a similar view of the current collection and its sub-collections.
- **Search** – Links to the **DocuShare Search** page, where you can search for specific information within the DocuShare site. If selected while in a collection, you can restrict the search to the contents of the current collection.
- **New** – Lists all objects that have been added to DocuShare within a time period you select.  
If selected while in a collection, you can restrict the listing to all new additions to the current collection.
- **Help** – Links to the **DocuShare Help Desk**, which includes the **DocuShare User Guide**. Access to the **DocuShare File UpHelper Application** and **Windows Client** installation files are also available from the Help Desk page.

## **Login**

**Logging in** to DocuShare gives you greater privileges on the DocuShare site. Until you log in, you have only limited **Guest** access. You only need to log in to DocuShare once per browser session. You remain logged in even if you minimize your browser window.

**Note:** If you are not logged in to DocuShare and you try to perform a restricted operation, such as accessing a protected file or submitting information, you will see a "Not Authorized" message. You will also be provided an opportunity to log in.

### **To log in to DocuShare:**

1. From the top navigation bar (any location in DocuShare), click the **Login** link. The **DocuShare Login** page appears.
2. Type your user name and password, then click **Login**. Remember that your user name and password are case-sensitive.
3. The **Login Successful** page appears. If you make a mistake and see the "Invalid password" or "Invalid user name" error message, click **Back** in the browser to return to the DocuShare Login page and try again.
4. Click the **Click here to continue** link to complete the login process.

The DocuShare page you started from appears. You are now logged in to DocuShare. Your user name should appear in the navigation bar.

### Logging out of DocuShare

You are automatically logged out of DocuShare when you close your browser session. To ensure the security of your documents, you should log out of DocuShare if you plan to leave your computer unattended and/or the screen unlocked.

#### To log out of DocuShare:

1. From the top navigation bar (any location in DocuShare), click the **Login** link. The **DocuShare Login** page appears.
2. Click the **Logout** link. The **Logout Successful** page appears.
3. Click the **Click here to continue** link.

The DocuShare page you first started with appears. You are now logged out of DocuShare. The word **Guest** is displayed in the navigation bar instead of your user name. As a guest, you can still browse the DocuShare repository, but you can no longer add content or update information.

### Accounts

The **Accounts** link displays the **DocuShare Community Registry**. In this registry you can:

- Log in as an existing user. See the previous section “[Login](#)” for details.
- Create a new user account. See “[Creating a User Account](#)” for details.
- List all registered users.
- Search for a registered user.
- Create a new user group. See “[Creating a User Group](#)” for details.
- List all registered groups.

**Note:** Depending on the access policies set by your Site Administrator, some or all of these features may not be available.

You can access the DocuShare Community Registry using one of two methods:

- Click the **Accounts** link from the navigation bar at the top of every DocuShare page.
- Click **Login** on any page, and then click **Accounts** at the bottom of the page.

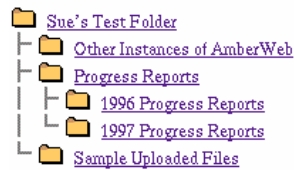
Follow the links for each option listed to perform the desired task within the Community Registry. The **List All Registered Users** or **List All Registered Groups** options provide an

alphabetical list of all registered users or groups. The **Search for a Registered User** option allows you to search the user listing to find a particular user.

## **Contents**

The **Contents** link provides a table-of-contents view of DocuShare collections. If accessed from the home page, it provides a view of the entire DocuShare repository. If selected while in a collection, it displays a similar view of the current collection and its sub-collections. You can click on any object within this index to access it. An example of this table-of-contents view is shown below.

### **Index of Sue's Test Folder**



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## **Search**

**Search** provides the ability to search for any item within the DocuShare site. If selected from the home page, it will search the entire site. If selected while within a collection, the search can be restricted to just that collection. For more information on searching, see Chapter 10, “[Searching in DocuShare](#)” for more details.

## **New**


Provides the same functionality as the “**What's New**” feature on the home page, but can be accessed anywhere within the DocuShare site. When selected from the home page, it presents a listing of all new items added to the site within the selected time frame. If selected while in a collection, the **What's New** listing can be restricted to just that collection. See “[What's New](#)” for more details.

## **Help**

**Help** provides access to the **DocuShare Help Desk**—information sources to help DocuShare users with problems encountered while using DocuShare. The **Quick Reference Guide** and the more extensive **DocuShare User Guide** can be found there. There is also a link to contact the Site Administrator to report any unusual problems.

Help also provides access to the installation files for the **DocuShare Windows Client** along with instructions for **DocuShare File UpHelper Application** installation.

## ***DocuShare Users***

A **user** is a registered user of DocuShare. They are represented in the *What's New* listing by a  icon.

## User Accounts

Although you can browse through the DocuShare site and view many documents contained there, you cannot write to the site or view restricted content without obtaining a **user account**. Registered users of a DocuShare site can add content, create personal or workgroup collections and view documents not available for viewing by guests of the site.

When you create a user account in DocuShare, that process creates a user record with information such as your name, email address, phone number, DocuShare user name, and DocuShare password (known only to you). This can provide a convenient resource to assist other users in contacting you. You can update this information at any time by editing your user properties.

**Note:** In the default setting for DocuShare, any guest can create a user account. Your DocuShare Site Administrator can alter this policy by restricting user account creation to only other registered users of the site or to the Site Administrator. Check with your DocuShare Site Administrator for the user account creation policies for your site.

### To create a user account:

1. From anywhere in DocuShare, click the **Accounts** link in the toolbar at the top of the page. The **DocuShare Community Registry** page appears.
2. Click the **Create a New User Account** link. The **Create User** page appears.  
**Note:** If you do not see the **Create a New User Account** link on this page, your Site Administrator has restricted the ability to create new accounts. Contact your Site Administrator for assistance.
3. Fill out the fields on the **Create User** page. Refer to the table below for descriptions of each field.  
**Note:** If you are unsure of the purpose of a field while creating this user account, you can click on the highlighted field name for a brief Help description of the field.
4. When completed, click the **Add User** button at the bottom of the page. The **Login Successful** page appears.

**Note:** DocuShare automatically logs you in after creating a new user account.

5. Click the **Click here to continue** link.

The **Create User** page has the following properties:

Property	Description
First Name	(Optional) Together with the Last Name field, provides your name for display purposes in DocuShare. <b>Note:</b> This is not the name you use to log in to DocuShare; you specify your login name in the User name field.
Last Name	Together with the First Name field, provides your name for display purposes in

DocuShare. **This is a required field.**

**Note:** This is not the name you use to log in to DocuShare; you specify your login name in the User name field.

Email Address	(Optional) Specifies your fully qualified email address. Used to send an individual mail message to you or when sending email to a DocuShare group of which you are a member. Your email address must be specified in full Internet format (for example, fred_smith@sales.acme.com).
Email Format	Specifies your preferred format when receiving email from DocuShare. Some mail environments, such as Microsoft Outlook, support the use of HTML-formatted mail. If you are using an HTML-capable mail reader, select <b>HTML</b> . Otherwise, select <b>Plain Text</b> , which works for all mail readers.
Home Page	(Optional) Specifies the URL (Uniform Resource Locator) for your personal Web home page, if you have one. The URL must be a fully qualified address including the "http://" (for example: http://somemachine.domain.companyname.com/~user.html).
Mailing Address	(Optional) Specifies your street address or an internal mailstop (for example, M/S 128-51E). For display purposes only.
Phone	(Optional) Your phone number or extension. For display purposes only.
Use Helper for Upload	<p>The <b>Use Helper for Upload</b> attribute specifies when to use the DocuShare File UpHelper application. It may be set to one of three values:</p> <ul style="list-style-type: none"> <li>• <b>Never</b> – Never use UpHelper. Files are uploaded via the browser's file upload function if it is an upload-capable browser.</li> <li>• <b>When Necessary</b> – The browser is used when possible; otherwise the Upload Helper is used.</li> <li>• <b>Always</b> – Always use UpHelper, never the browser. This setting is required if you use an upload-enabled browser but still wish to use UpHelper because of its ability to upload multiple files.</li> </ul> <p>For more information on the DocuShare File UpHelper Application, please see "<a href="#">DocuShare UpHelper</a>" in Chapter 1.</p>
Organization	(Optional) Specifies your internal workgroup organization. For display purposes only.
User name	<p>Specifies the name you use to log in to DocuShare. <b>This is a required field.</b> This entry is case-sensitive. When you log in to DocuShare you <b>must</b> type your user name exactly as you enter it in this field.</p> <p><b>Note:</b> DocuShare user names and passwords are unique in the DocuShare system; they are not the same as your user name and password for any other system (for</p>

example, Novell). Logging in to DocuShare does not log you into the Novell network and vice versa.

Password	Specifies the password you use to log in to DocuShare. <b>This is a required field.</b> This entry is case-sensitive. When you log in to DocuShare you <b>must</b> type your password exactly as you enter it in this field. The password does not expire. <b>Note:</b> DocuShare user names and passwords are unique in the DocuShare system; they are not the same as your user name and password for any other system (for example, Novell). Logging in to DocuShare does not log you into the Novell network and vice versa.
Password Again	Requires you to type your password a second time for confirmation. <b>This is a required field.</b>

**Note:** There may be additional properties displayed on this page that are not listed here. They are specific to your DocuShare site. See your Site Administrator for details.

**Note:** If you forget your DocuShare password, do not reregister as a user. Instead, contact your local DocuShare Site Administrator for assistance.

## Viewing User Properties

You can view the properties of a user at any time. You do not need to be logged in to view user properties. However, you must be logged in to DocuShare to perform any editing functions that can be accessed through the Services page.

There are two ways to access a user's **Services** page, depending upon your location:

- Click on the user's user name anywhere in the DocuShare site. This could be as a logged in user in the Navigation Bar or as the listed owner of a DocuShare object.
- Click on the **Accounts** link in the Navigation Bar. In the **DocuShare Community Registry**, select **List All Registered Users**. Select the name of the user from this listing.

User properties include:

- The first name and last name of the user.
- The email address of the user.
- The user's home page (if any).
- The user's mailing address, phone number and organization.
- The user groups that list this user as a member. To see the properties for any of these groups, click on their name.
- The user's user name.
- The user's Use Helper for Upload property.

**Note:** There may be additional properties displayed on this page that are not listed here. They are specific to your DocuShare site. See your Site Administrator for details.

All of these properties (except groups and user name) can be **modified** by the user through the **Edit Properties** function. To edit the user's **User name**, use the **Change User name** function.

The **Services** page provides access to editing functions using these selections in the pull-down menu area:

- **Edit Properties** – Edit your user properties.
- **Change Password** – Change your password.
- **Change User name** – Change your user name.

**Note:** These editing functions are **only** available to the registered user listed or the Site Administrator. A user cannot edit another user's properties.

## ***Editing User Properties***

You can edit any user property after initial creation. You must be logged in as the registered user to edit your user properties. You cannot edit another user's properties.

### **To edit your properties:**

1. View your user properties:
  - Click on your user name anywhere in the DocuShare site. This could be as a logged in user in the Navigation Bar or as the listed owner of a DocuShare object.
  - Click on the Accounts link in the toolbar at the top of each page. In the DocuShare Community Registry, select List all Registered Users. Select your name from this listing.

The **User Services** page appears, showing the user properties.

2. Click the **Edit Properties** selection in the **Edit...** pull-down menu. The **Edit User** page appears.
3. Edit the information. Refer to the property descriptions in the previous table for details. **Note:** If you are unsure of the purpose of a field while editing these properties, you can click on the highlighted field name for a brief Help description of the field.
4. Click the **Apply** button. The **User Services** page for the user appears. The properties have now been updated to reflect your changes.

## ***Changing Your User Name or Password***

### **To change your Password:**

1. View your user properties (see instructions above).
2. Click the **Change Password** selection in the **Edit...** pull-down menu. The **Change User Password** page appears.
3. Your First Name, Last Name and User name will display. In the entry box for **Old Password**, type in your current password. In the entry box for **New Password**, type in your new password. In the entry box for **New Password Again**, type the new password again. Both entries are case sensitive.
4. Click the **Apply** button. The **Services** page for the user appears. Your password has now been changed.

#### To change your User name:

1. View your user properties (see instructions above).
2. Click the **Change User name** selection in the **Edit...** pull-down menu. The **Change User name** page appears.
3. Your First Name, Last Name and current User name will display. In the entry box for **Password**, type in your current password. In the entry box for **New User name**, type in your new user name. Both entries are case sensitive.
4. Click the **Apply** button. The **User Services** page for the user appears. Your user name has now been changed.

## DocuShare Groups

A **group** is an assembly of one or more DocuShare users and/or other groups into a distinct unit. They are represented in the **What's New** listing by an  icon.

### Creating a User Group

When you are working with more than a few individuals or documents, creating a user group makes it easier to maintain access permissions for a group of users. You must be logged in to create a user group.

#### To create a user group:

1. From any location in DocuShare, click the **Accounts** link in the Navigation Bar. The **DocuShare Community Registry** page appears.
2. Click the **Create a New Group** link. The **Create Group** page appears.
3. Fill out the **Create Group** page. Refer to the property descriptions in the table below for details.

4. To **Add Members** to the group, select a user or group from the scrolling list. To make additional selections, press the CONTROL key while selecting the additional users or groups.  
**Note:** Use the CONTROL key for MS Windows-based Operating Systems only. Substitute the Command (or Apple key) key for the MacOS. UNIX-based systems require no special key for this multiple list item selection.
5. Click the **Add Group** button at the bottom of the page. The **Group Services** page appears. The new group is now registered in DocuShare.

The **Create Group** page has the following properties:

Property	Description
Group Name	Contains a descriptive name for the permission group (for example, PIT Members). <b>This is a required field.</b> This name will be used in all menus when selecting, viewing, or editing the group. Choose a name that reflects the function of the group.
Summary	(Optional) Contains a short description of the group being created in DocuShare (for example, Members of Process Improvement Team). The contents of the Summary field will appear below the object's title on the page in which the object appears.
Change Membership	If you select Owner, only the owner of the group (the user who created the group in DocuShare) can change the membership of the group. If you select Group Members, the specified members of the group can change the membership of the group. The default is Owner.
Members	Use this scrolling list to specify the members of the new group. The list shows the names of all registered DocuShare users and groups. If you select user <b>Anyone</b> , any user (including guests) browsing the DocuShare repository is automatically a member of the group.

**Note:** There may be additional properties displayed on this page that are not listed here. They are specific to your DocuShare site. See your Site Administrator for details.

You can list all of the currently registered DocuShare groups from the **DocuShare Community Registry**. Click the **Accounts** link on any DocuShare page to go to the Registry, then click the **List All Registered Groups** link to view the **Current DocuShare Groups** page.

## Viewing Group Properties

You can view the properties of a group at any time. You do not need to be logged in to view group properties. However, you must be logged in to DocuShare to perform any editing functions that can be accessed through the Services page.

To access a group's **Services** page, click on the **Accounts** link in the Navigation Bar. In the **DocuShare Community Registry**, select **List All Registered Groups**. Select the name of the group from this listing.

Group properties include:

- The title and summary of the group.
- The group's identifying object number (handle), the owner of the group and the date and time of creation and last modification.
- Whether the Owner or the Members can change group membership.
- The members of the group. To see the user properties for any of these users, click on their name.

**Note:** There may be additional properties displayed on this page that are not listed here. They are specific to your DocuShare site. See your Site Administrator for details.

All of these properties (except the object ID and the creation/modification dates/times) can be **modified** by the owner of the group through the **Edit Properties** function. You can also use this function to add new members to the group or remove members from the group. To edit the **Owner** of the group, use the **Change Owner** function.

The **Group Services** page provides access to editing functions, using these selections in the **Edit...** pull-down menu:

- **Delete** – Delete this user group.
- **Edit Properties** – Edit the properties of this group.
- **Change Owner** – Changes the owner of the group.
- **Mail To** – Send a mail message to all members of the group.

## ***Editing Group Properties***

You can edit the properties of a DocuShare user group at any time by selecting **Edit Properties** from the **Edit...** pull-down menu on the Group Services page. Editing group properties also allows you to add or remove members from a group. You must be the owner of the group to edit its properties. You must also be logged in to DocuShare.

**To edit the properties of a group:**

1. From any location in DocuShare, click the **Accounts** link. The **DocuShare Community Registry** page appears.
2. Click the **List All Registered Groups** link. The **Current DocuShare Groups** page appears with the names of all groups registered in DocuShare.

3. Click the name of the group you want to update. The **Group Services** page for the specified group appears.
4. Click **Edit Properties** from the **Edit...** pull-down menu. The **Edit Group** page appears.
5. Edit the group information. Refer to the property descriptions in the previous table for details.
6. Use the **Add Members** and **Remove Members** scrolling lists to add or remove members from the group. To make additional selections, press the CONTROL key while selecting the additional users or groups.  
**Note:** Use the CONTROL key for MS Windows-based Operating Systems only. Substitute the Command (or Apple key) key for the MacOS. UNIX-based systems require no special key for this multiple list item selection.
7. Click the **Update Group** button at the bottom of the page. The **Group Services** page for the group appears. The properties of the group are updated to reflect your edits.

### ***Change Owner of a Group***

If you are the owner of a group, you can transfer ownership of the group to another user. You must be logged in to DocuShare.

#### **To change ownership of a group:**

1. View the properties for the group.
2. Click the **Change Owner** selection in the **Edit...** pull-down menu.
3. Select a user from the **New Owner** scrolling list.
4. Click the **Apply** button.

The group now reflects the change in owners.

### ***Mailing to all Group Members***

You can send an email message to all members of a DocuShare user group if:

- Each group member correctly specified his or her full email address in his or her DocuShare User Properties.
- Your Web browser has a properly configured mail client. See your System Administrator for information on configuring Web browser mail clients.

#### **To send an email message to a user group:**

1. From any location in DocuShare, click the **Accounts** link. The **DocuShare Community Registry** page appears.

2. Click the **List All Registered Groups** link. The **Current DocuShare Groups** page appears with the names of all groups registered in DocuShare.
3. Click the name of the group to which you want to send mail. The **Group Services** page for the group appears.
4. Click **Mail To** in the pull-down menu. The **Send Mail to Members** of < > page appears.
5. Click the **To compose an email message to the group, click here** link. The mail **group name** client composition window appears.
6. Type the message and fill in the Subject field. The Recipients list is already filled in with the addresses of the DocuShare group members.
7. Click **Send**. The message is sent to the members of the DocuShare user group.

## ***Deleting a User Group***

Only the logged-in owner of a user group or a DocuShare site administrator can delete the group.

To delete a user group:

1. From any location in DocuShare, click the **Accounts** link. The **DocuShare Community Registry** page appears.
2. Click the **List All Registered Groups** link. The **Current DocuShare Groups** page appears with the names of all groups registered in DocuShare.
3. Click the name of the group you want to delete. The **Group Services** page appears.
4. Click **Delete** in the **Edit...** pull-down menu. The Confirm Deletion page appears.  
**Note:** If you change your mind, click **Back** in the browser to close the Delete Object page.
5. Click **Delete**. The **Delete Successful** page appears, and the group is deleted from DocuShare.

### 3 DocuShare Permissions

[Overview of Object Permissions](#)

[Viewing and Editing DocuShare Object Permissions](#)

[Adding Users and Groups to an Object's Access List](#)

[Unifying DocuShare Object Permissions](#)

[Changing an Object's Owner](#)

[Working with Write-Only Objects](#)

#### Overview of Object Permissions

Every DocuShare object has a set of associated permissions called its *Access Control List*.

**Permissions** are the authorization level that a defined set of users or groups has to view, delete or modify a DocuShare object. These object permissions are not assigned or maintained by the Site Administrator; rather, they are maintained by the owner of the object or any user with Manager level access to the object.

There are three permission categories:

- **Reader** – Allows the user or group to read the contents of a file or object and view its associated properties and permissions. The user can open a file from the DocuShare site and can also save this file to their local computer. However, a user with only Reader access to an object cannot change its properties or add new content. No writing or editing of any kind is granted by Reader-level access. Users will only see objects in collection, Contents or What's New listings for which they have Reader-level access.
- **Writer** – Allows the user or group to edit an object's properties and add new objects to a container object (e.g., a collection). Writer level access to an object does not grant permission to delete it or edit its permissions. Granting users or groups Writer permission without granting them Reader permission enables advanced features like blind submission collections, but requires that special steps be taken to make those features accessible. See the section entitled [Working with Write-Only Objects](#) at the end of this chapter.
- **Manager** – Grants the user or group full read/write access to the object. In addition to read/write permission, a Manager can delete the object and edit its access permissions. Users with Manager permission can also change ownership rights of an object from its current owner to another user.

The user who initially creates an object in the DocuShare repository, known as the **owner**, receives automatic Manager level permission after creating the object. The owner can now assign which users and groups can access the object and what level of access they have to this object. Permissions are assigned at the individual object level.

You specify permissions using one or more user names, group names, or both. When you are working with more than a few individuals or objects, user groups can make creating and maintaining access permission lists easier. A user group is a named set of users and/or groups. See [Creating a User Group](#) in Chapter 2 for more information on creating a user group in DocuShare.

Permissions work with your logged in status on DocuShare. If you are not logged in to DocuShare, you are considered a Guest and the user name **Guest** appears on each page. **Guests cannot add objects or perform any edit operations.**

Within access permissions, the user **Anyone** represents anyone accessing a DocuShare object, either a logged-in user or a guest. Granting write access to **Anyone** gives any logged in user write permission; Guest is always denied edit capability. For example, if you give Reader- and Writer-level access to Anyone for a collection, then user Mary Smith can view the contents of the collection, even if she is not logged in (i.e., a guest). However, if Mary Smith wants to add an object to that collection, she must log in. If she is not logged in, when she attempts to add that object, DocuShare will present a warning message stating that Guest cannot perform that operation. It will also present a login box to allow the user to log in and complete the operation. The user will only be able to complete adding the object if they have Writer access permissions to the object.

Object permissions can be inherited from higher-level parent or **container objects**. Collections, Calendars, and Bulletin Boards are considered container objects because they hold other objects. Calendars hold **Events**, Bulletin Boards hold **Bulletins**, and Collections hold every other type of DocuShare object, including other collections. By initially setting the access permissions for a higher level container object, any object subsequently added to that container object automatically **inherits** those higher-level permissions from the container object.

For example, if you create a collection and give user Joe Smith both Reader and Writer access to the collection, then any object (e.g., file, Collection, Calendar, or Bulletin Board) subsequently added to that collection **automatically** contains Reader and Writer access permissions for user Joe Smith. Inheriting permissions from container objects can be a very powerful tool to quickly set access permissions for new DocuShare objects.

## ***Viewing and Editing DocuShare Object Permissions***

To view the current permissions on a DocuShare object, click on the **Services** icon for the object, then click **Permissions** in the **Edit...** pull-down menu. If you have Manager access permissions to the object, you see the **Edit Permissions** page (shown below). Otherwise, you see the **View Permissions** page, a read-only version of the same information. You must be logged in to DocuShare to edit permissions in any manner.

**Edit Collection Permissions**

Edit... Go

Title: Initial Top-Level Collection A

Owner: admin

Private: ☐ yes ☒ no

Access List:

User/Group	Reader	Writer	Manager	Remove From Access List
<u>Site Administrator</u>	x	x	x	
<u>Anyone</u>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Reset Update Permissions

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The **Permissions** page has the following properties:

Property	Description
Title	Displays the title or name of the DocuShare object.
Owner	Displays the current owner of the DocuShare object.
Private	<p>Specifies whether the title of the DocuShare object will appear in a search result. <b>Yes</b> allows only users with Reader access to see the object in a search results list. <b>No</b> lists the object's title, summary, and owner information in the search results list, regardless of the user's access rights.</p> <p>Users without Reader access to the objects will not be able to view the object and its properties, but will have enough information to contact the owner for access permission rights.</p>
Access List	<p>Lists users and/or groups that have access to the object and the associated permissions:</p> <ul style="list-style-type: none"> <li>• <b>Reader:</b> The user can view the contents of the object and the associated properties, but cannot edit them.</li> <li>• <b>Writer:</b> The user can edit the object content and associated properties, as well as add new file versions.</li> <li>• <b>Manager:</b> The user can delete, view, and edit the object and its permissions, delete the object, and change the object's owner. The owner always has manager-level access and is therefore not an editable entry in the access list.</li> </ul>

**To edit the permissions of an object in DocuShare:**

1. At the DocuShare object whose permissions you want to change, click the **Services** icon. The **Services** page appears.
2. Click the **Permissions** selection in the **Edit...** pull-down menu. The **Permissions** page appears. If you have Manager level access, you can edit the contents of the page.
3. Click any check box to select or deselect Reader, Writer, or Manager access for a user or group. A check mark means that the corresponding access right apply.
4. Click the check box **Remove From Access List** to remove a user or group from the access list.
5. Click **Update Permissions** to finalize your changes. Click **Reset** to cancel your changes.

**Adding Users and Groups to an Object's Access List****To add users and groups to an object's access list:**

1. At the DocuShare object whose permissions you want to change, click the **Services** icon. The **Services** page appears.
2. Click the **Permissions** selection in the **Edit...** pull-down menu. The **Permissions** page appears. If you have Manager level access, you can edit the contents of the page.
3. Click the **Add to Access List** selection in the **Edit...** pull-down menu.
4. Select one or more users or groups from the **Add Members** list. This is a list of users who are currently not members.
5. Click **Add Members to Access List**.

At first, the users and groups that are added to the access list appear without new access rights. Follow the steps in the previous section to grant specific access rights to the new users or groups.

**Unifying DocuShare Object Permissions**

Occasionally, you may change the permissions for a higher-level container object (Collection, Calendar, and Bulletin Board). Perhaps you may want to add a new user or extend wider access to another user or group. However, the objects within that container object will not reflect those new permissions. You can edit the permissions for each object individually, but that process can be time-consuming and error prone, especially if there are a large number of objects within that container object. DocuShare provides the **Unify** command to make this process easier.

Edit the permissions on the higher level DocuShare container object, then select **Unify** to set the permissions for all objects within that higher level container object to inherit the revised permission settings. However, if you do not have Manager level access to an object, **Unify** will not change permissions for that object. DocuShare will list those objects as it performs the Unify command. Permissions for these objects must still be edited individually by someone with Manager access permission.

**To unify object permissions:**

1. At the DocuShare collection, click the **Services** icon. The **Collection Services** page appears.
2. Select **Permissions** from the **Edit...** pull-down menu. The **Edit Collection Permissions** page appears. Make any changes that are necessary at this time.
3. Select **Unify** from the **Edit...** pull-down menu on the **Edit Collection Permissions** page.  
**Note:** The **Do not unify objects that are also located elsewhere** option means that the Unify command will not apply to objects that are also located outside of the set being unified. Leave this option checked to prevent the changes performed by the Unify command from propagating into other areas of the DocuShare repository.
4. Click **Unify**.

**Changing an Object's Owner**

Users with Manager access to an object can change the object's owner at any time. The default owner is the user who initially created the object in DocuShare. While all Managers of an object have the same permissions as its owner, it is the owner's name that is shown whenever the object is displayed or an unauthorized access is attempted.

**To change an object's owner:**

1. At the DocuShare collection, click the **Services** icon. The **Collection Services** page appears.
2. Select **Permissions** from the **Edit...** pull-down menu. The **Edit Collection Permissions** page appears. Make any changes that are necessary at this time.
3. Select **Change Owner** from the **Edit...** pull-down menu on the **Edit Collection Permissions** page.
4. Select a new owner from the **New Owner** list. You can only select one owner.
5. Click **Apply**.

Ownership of the object is assigned to the new owner. The previous owner is added to the object's access list and is automatically given Reader, Writer, and Manager access permissions.

**Working with Write-Only Objects**

Because Reader and Writer permissions are independent, DocuShare offers the ability to grant write-only access to objects. The primary use of this feature is to create container objects that allow users to add content while preventing them from seeing what other users have added. For example, a "Suggestions" bulletin board can be created that allows users to privately add their suggestions for improving the company. This bulletin board could even be made anonymous by granting write permission only to a special anonymous account to which submitters must log in

prior to making their suggestions.

Because users with write-only access to an object cannot open it or even see it, they are unable to reach the object's regular **Add...** menu. Submission to write-only objects requires going directly to the desired edit form. For example, to add a new bulletin to a write-only bulletin board called BulletinBoard-16, a user must go to:

<http://docushare-server/dscgi/ds.py/Add/BulletinBoard-16/Bulletin>

This link can be made available to users as a DocuShare URL, or as a link on a custom web page. For blind submission to collections, the link is similar. For example, to add a file to Collection-47, users would go to:

<http://docushare-server/dscgi/ds.py/Add/Collection-47/File>

## 4 DocuShare Collections

[Adding a Collection](#)


[Viewing Collection Properties](#)

[Editing Collection Properties](#)

[Deleting a Collection](#)

[Restoring a Deleted Collection](#)

[Editing the Location of a Collection](#)

A **collection** is the DocuShare equivalent of a folder. A collection is represented by an  icon. Collections are considered **container objects**, which means that they can hold other DocuShare objects (e.g., other (sub)collections, documents or application files, bulletin boards, URLs, or calendars).

### Adding a Collection

You can add a collection to any location in DocuShare to which you have at least Writer access permissions. However, you must be logged in to DocuShare to create a collection.

#### To create a collection:

1. From the location in DocuShare where you want to add a collection, select **Add Collection** from the **Add...** pull-down menu. The **Add Collection page** appears.
2. Fill out the fields on the **Add Collection** page. Refer to the table below for descriptions of each field.  
**Note:** If you are unsure of the purpose of a field while creating the collection, you can click on the highlighted field name for a brief Help description of the field.
3. Click the **Apply** button to complete this process. The collection is created in DocuShare and the **Services** page for the collection appears.

The **Add Collection page** has the following properties:

Property	Description
Title	Specifies a descriptive title for the collection. The title can contain spaces and other punctuation marks. You should assign a meaningful title to the collection. <b>This is a required field.</b>
Summary	(Optional) Specifies a brief description of the collection. The contents of this field are displayed below the collection title. Use the Description field to provide a more

detailed description for the collection.

Description	(Optional) Contains a detailed description of the collection. The contents of this field are displayed below the collection title and summary on the DocuShare collection page. The Description field can contain HTML markup to customize the collection's appearance. (See the <a href="#">Troubleshooting</a> section for cautions about using some HTML markup categories)
Keywords	(Optional) This field should contain any <i>Keywords</i> associated with this object. Keywords help to categorize documents and allow for more accurate searching. Simply type in a series of words in the field.
Show Search Tool	Enables users to enter simple search queries directly within a collection page, without having to go to the more sophisticated DocuShare Search facility. Searches may be for content anywhere on the site, or limited to the contents of the current collection. When <i>Show Search Tool</i> is set to <b>No</b> , the search tool will not be displayed for that collection.
View Format	Indicates how its contents should be displayed. The <b>Detailed Listing</b> setting provides a traditional file folder list view. The <b>Images</b> setting provides a thumbnail view of image files and a large icon view of other content types. Thumbnails will be generated for GIF, JPEG, TIFF, BMP, PNG, and Targa file formats.

**Note:** There may be additional properties displayed on this page that are not listed here. They are specific to your DocuShare site. See your Site Administrator for details.

You can verify that the collection was created by clicking the **Appears In** link to move you up one level in the collection hierarchy. The collection should now be listed with a **New** icon. If you don't see the collection, click **Reload** on your browser to refresh the page display.

**Note:** After creating the collection, you should adjust the **access permissions** for the collection to make sure they provide the desired level of access for other users and groups. See the section [Viewing and Editing DocuShare Object Permissions](#) in Chapter 3 for more information on adjusting these permissions.

## Viewing Collection Properties

You can view the properties of a collection at any time. You do not need to be logged in to view the collection properties. However, you must be logged in to DocuShare to perform any editing functions that can be accessed through the Services page.

There are two ways to access a collection's **Services** page, depending upon your location:

1. While in an open collection, select **View Properties** from the **Edit...** pull-down menu, or
2. In a higher-level collection listing, click on the **Services** icon to the right of the collection listing.

Collection properties include:

- The title, summary and description of the collection
- Keywords to enhance searching
- The collection's identifying object number (handle), the owner who created the collection and the date and time of creation and last modification
- An image, called **logo**, that can appear at the top of the collection page
- A background image for the collection page
- The sort order of objects contained within the collection
- The location of this collection within the collection hierarchy of the DocuShare site (**Appears In** property). All DocuShare objects may appear in one or more locations
- The collection search tool, which enables users to enter simple search queries directly within a collection page
- The collection's format, which indicates how its contents should be displayed

**Note:** There may be additional properties displayed on this page that are not listed here. They are specific to your DocuShare site. See your Site Administrator for details.

All of these properties (except the object ID, the creation/modification dates/times, and collection location) can be edited or modified by the owner of the collection or a user with Writer access permissions through the **Edit Properties** function. To edit the **Appears In** property (collection location), use the **Edit Location** function.

The **Collection Services** page provides access to editing functions, using these selections from the **Edit...** pull-down menu:

- **Edit Properties** – Edit the properties for this collection. You must be the owner of the collection or have at least Writer access permissions to edit collection properties.
- **Permissions** – View the access permissions for this collection. If you are the owner or have Manager access permissions, you can also edit the access permissions from here.
- **Edit Location** - Change (move) or add locations for this collection. You must be the owner of the collection or have at least Writer access permissions to change collection locations. See the section [Editing the Location of a Collection](#) in this chapter for more information.

## **Editing Collection Properties**

Many of the Properties of a collection can be edited or modified after initial creation. You must be the owner of the collection or have Writer access permissions to edit the properties for a collection. You must also be logged in to DocuShare.

In addition to editing properties such as title, summary and description, you can also change the sort order of the objects contained within a collection, add an image that will appear at the top of a collection page, or add an image that will appear as the background for the collection page.

### To edit the properties of a collection:

1. Go to the edit page for this collection:
  - If located in the open collection, select **Edit Properties** from the **Edit...** pull-down menu. The **Edit Collection** page appears.
  - Within a higher-level collection listing, click on the **Services** icon to the right of the collection listing. The Services page appears. Select **Edit Properties** from the **Edit...** pull-down menu. The **Edit Collection** page appears.
2. Edit the information. Refer to the descriptions in the table below for details on the properties that can be edited through this function.  
**Note:** If you are unsure of the purpose of a field while adding a collection, you can click on the highlighted field name for a brief Help description of the field.
3. Click the **Apply** button. The **Services** page for the collection appears. The properties have now been updated to reflect your changes.

The **Edit Collection** page has the following properties:

Property	Description
Title	Specifies a descriptive title for the collection. The title can contain spaces and other punctuation marks. You should assign a meaningful title to the collection. <b>This is a required field.</b>
Summary	(Optional) Specifies a short description for the collection. The contents of this field are displayed below the collection title. Use the Description field to provide a more detailed description of the collection.
Description	(Optional) Specifies a detailed description for the collection. The contents of this field are displayed below the collection title and summary on the DocuShare collection page. The Description field can contain HTML markup to customize the collection's appearance. (See the <a href="#">Troubleshooting</a> section for cautions about using some HTML markup categories)
Keywords	(Optional) Lets you associate one or more words with the collection. Keywords help categorize the different collections and streamline searches.
Logo	(Optional) Contains a URL that points to a .GIF or .JPG image that is displayed at

the top of the collection page. You can specify any valid URL. If you want to use an image that is already in DocuShare, you can supply the file handle (object ID#) for that image (for example, File-3072), and DocuShare automatically converts the file handle into the correct URL for the image.

Background Image	(Optional) Contains a URL that points to a .GIF or .JPG image that is displayed as the background of the collection page. You can specify any valid URL. If you want to use an image that is already in DocuShare, you can supply the file handle (object ID#) for that image (for example, File-3073), and DocuShare automatically converts the file handle into the correct URL for the image.
Sort Order	Specifies the sort order for the contents of the collection by type and title, type and date, date only, or title only. The default sort order is by type and title.
Show Search Tool	Enables users to enter simple search queries directly from a collection page, without having to go to the DocuShare Search page. When <i>Show Search Tool</i> is set to <b>No</b> , the search tool will not be displayed for that collection.
View Format	Indicates how the collection contents should be displayed. The <b>Detailed Listing</b> setting provides a traditional file folder list view. The <b>Images</b> setting provides a thumbnail view of image files and a large icon view of other content types.

**Note:** There may be additional editable properties displayed on this page that are not listed here. They are specific to your DocuShare site. See your Site Administrator for details.

## Deleting a Collection

Only the owner of a collection or a user with Manager access can delete a collection from DocuShare. You must be logged in to delete a collection from DocuShare.

Unlike the more familiar file-management model that requires you to select an item before you delete it, DocuShare requires that you must open or be within a collection in order to delete it. This ensures that you view the contents of the collection prior to deletion.

If you choose to delete a collection that contains other objects, you will be given the choice to delete the collection and all objects contained within the collection or to delete just the collection. Deleting a collection without deleting its contents will orphan the contents of the collection. Orphaned objects still exist within DocuShare but are not accessible to users. Only a Site Administrator can recover orphaned objects.

**Note:** Your collection will not be deleted if it contains objects that you do not own or do not have Manager access permission.

### To delete a collection:

1. Open the collection that you want to delete.
2. Select **Delete** from the **Edit...** pull-down menu.

3. If there are no objects in the collection, the **Confirm Deletion** page appears. Select the **Delete** button to delete the collection.

If the collection contains other objects the **Delete** page appears. This page lists the number of objects in the collection that will be deleted. It also lists the number of objects that will not be deleted because of insufficient access rights or because they appear in other locations.

- To delete the collection and its contents, select the **Delete Object and Contents** button.
- To delete just the collection, select the **Delete Just this Object** button.

**Note:** If you change your mind about deleting this collection, use the **Back** button on your browser to close the Delete or Confirm Deletion page.

4. The **Delete Successful** page appears. Click the **Click here to continue** link.

The collection is now deleted. You may need to **Reload** the page to see these changes.

### ***Restoring a Deleted Collection***

If you inadvertently delete a collection from the DocuShare repository, the Site Administrator can easily restore it for you. All deleted content is sent to a trashcan accessible only to the Site Administrator. If you mistakenly delete an object, you must contact the Site Administrator and provide him/her with the required information. The Site Administrator is responsible for purging the recycle bin on an as-needed basis. After purging, you will be unable to restore items deleted, so be sure to notify the Site Administrator of deletion restorations as soon as possible.

### ***Editing the Location of a Collection***

The **Edit Location** command allows a user to move a DocuShare object from one location to another or allows the object to appear in multiple locations within the DocuShare repository. You must have at least Writer access to the object to change its location.

The location of an object is displayed in the **Appears In** property, which is displayed at the end of each **Properties** listing for an object. Using the **Edit Location** command allows you to edit the **Appears In** property.

This is a helpful command if you have created a collection (or any other DocuShare object) in the wrong location and want to move it instead of deleting it and then re-creating it. It is also helpful if you would like the same object to appear in one or more additional locations. All DocuShare objects can appear in multiple locations at once. However, there is actually only one physical copy of the object in the DocuShare database; the system simply creates additional pointers or references to the object.

A negative side effect of this command is that if used incorrectly, you can orphan the object. Orphaned objects still exist within the DocuShare repository but are not accessible to users. Only a Site Administrator can recover orphaned objects.

**To edit the location of a collection:**

1. From an open collection, select **Edit Location** from the **Edit...** pull-down menu. The **Edit Collection Location** page appears.
2. For the **Appears In** field, a scrolling list is displayed that contains all DocuShare collections to which you have at least Writer access. The collection's current location is highlighted.
  - To move an object, select the collection where you wish to move this object. The previous location will be deselected.
  - To have an object appear in multiple locations, press the CONTROL key while selecting the additional locations.  
**Note:** Use the CONTROL key for MS Windows-based Operating Systems only. Substitute the Command (or Apple key) key for the MacOS. UNIX-based systems require no special key for this multiple list item selection.

**Note:** Use caution when deselecting locations. Deselecting improperly can create orphaned files. Be sure that at least **one** location is selected in the scrolling list before selecting the **Update Locations** button.
3. Click the **Update Locations** button.

The Services page for that collection now appears and the new location(s) is/are displayed in **Appears In**. If you don't see this change reflected on the Services page, click **Reload** on your browser to refresh the page display.

## 5 DocuShare Files

### [Overview](#)

### [Adding Files to DocuShare](#)

- [Using a Web Browser](#)
- [Using the DocuShare File UpHelper Application](#)

### [Viewing File Properties](#)

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### [Deleting a File](#)

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### [View Files in HTML](#)

### [Editing the Location of a File](#)

### [Managing Files Through Versioning and Locking](#)

### [Working with Files](#)

## Overview

DocuShare allows you to store and manage documents in many popular file formats and access those files via a World Wide Web (WWW) connection.

DocuShare provides a **repository** on an internal network server that is accessed through a Web browser. You can add files to this repository from your computer. Conversely, you can also download copies of these files from the repository and open or save them to your computer. You can manage access to these files by other users by setting user access permissions. You can also delete files from the repository, manage multiple document revisions, and lock files for safe collaborative authoring.














Because DocuShare provides this web-based repository, you can access, transfer and share files between groups located within an internal network. All the users need to use the DocuShare file repository is a properly configured Web browser and access to the internal network.

Files are downloaded from the DocuShare repository simply by clicking on the filename. If your browser is properly configured to open a file of this application type, the file's native application will open and the file will be displayed. You can then choose to save the file to your own computer, print out a copy from the application, or just view the file and close it when finished.

**Note:** Downloading does not transfer the actual file to your computer, only a copy. The original

copy of the file remains in the DocuShare repository until it is deleted.

The DocuShare server comes with default settings to accept a variety of popular application file types, including:

DocuShare Icon	Application	File Extensions
	Microsoft Word	.doc, .dot
	Microsoft Excel	.xls
	Microsoft PowerPoint	.ppt
	Microsoft Access	.mdb
	Microsoft Project	.mpp
	Adobe Acrobat (pdf)	.pdf
	PostScript	.ps
	Visio	.vsd
	Compressed Files (zip)	.zip
	Image File formats	.gif, .jpg, .pct
	Rich Text Format (rtf)	.rtf
	Executable files	.exe
	Text or HTML files	.txt, .htm, .html

**Note:** This may not be a complete list of application file types or extensions for your particular DocuShare site. Contact your Site Administrator for a complete listing.

DocuShare only provides a *repository* for these file types. Because you are using a Web browser to access the files in this repository, it is the configuration of your Web browser that controls how these files are handled. They can be opened within the browser or application window or saved directly to your computer. For most of the proprietary application formats listed in the previous table, your Web browser requires helper applications to view these files properly. In most cases, these are the same applications that were originally used to create these files. Your browser must be configured to use these helper applications to view these files. This is essential for successful use of DocuShare.

For example, your browser may be configured to open the application Microsoft Word whenever you download a file that has the extension of “.doc”. Your browser may also be configured to automatically save any file that has the extension of “.exe” or “.zip”. To ensure that your browser is properly configured for these applications, see the section [Helper Applications](#) in Chapter 1 for more details.

Windows Users have the option of utilizing the **Windows Client** and **ODMA Client** to view, manage, and edit DocuShare files directly from Explorer or editor applications. See Chapter 11, [Using the DocuShare Windows Client](#) and Chapter 12, [DocuShare ODMA Client](#) for more information on these options.

## ***Adding Files to DocuShare***

You can add a file to any collection in DocuShare to which you have at least Writer access permissions. You must also be logged in to DocuShare to add a file.

New or edited files are sent (or uploaded) to the DocuShare repository using three different methods:

- **Using a file upload enabled web browser (Netscape 2.0 or above, or MS Internet Explorer 4.0)** Using a file upload enabled browser allows you to send one file at a time to the DocuShare repository through a standard DocuShare form.
- **Using a web browser that is not file upload enabled (MS Internet Explorer 2.0 and 3.0)** If you are using a browser that is not file upload enabled, you **can** use the DocuShare File UpHelper application to upload files to the DocuShare repository. See [DocuShare UpHelper](#) in Chapter 1 for installation instructions.
- **Windows users can “drag-and-drop” files to add them to DocuShare.** Using standard Windows Explorer procedures, select and copy files to the DocuShare-mounted server within Explorer. See Chapter 11, [Using the DocuShare Windows Client](#) for more information on this option.

Use (or non-use) of the File UpHelper application is controlled by the “**Use Helper for Upload**” user property. See “[DocuShare Users](#)” in Chapter 2 for more details on this setting.

## ***Adding a File to DocuShare using a Web Browser***

To add (or upload) a file to the DocuShare repository using a web browser, you must be using a file upload enabled web browser (Netscape 2.0 or above) and your “**Use Helper for Upload**” attribute in User Properties must be set to either **When Necessary** or **Never**. You must be logged in to DocuShare and have at least **Writer** access permissions to the collection.

### **To add a file to DocuShare using a Web Browser:**

1. In the collection where you want to add the file, select **Add File** from the **Add...** pull-down menu. The **Add File** page appears.
2. Click the **Browse** button. The Browse dialog appears.  
**Note:** If the Browse button is **not** displayed on this page, your Web browser cannot upload files. You must use the DocuShare File UpHelper to upload files.

3. Browse for the file on your computer and select the file to add. You may need to adjust the files types drop down box to view your selected file type. Click **Open** or **Accept**. The path to the file is displayed in the File field.
4. Fill out the fields on the **Add File** page. Refer to the table below for descriptions of each field.  
**Note:** While adding this file, if you are unsure of the purpose of a field, you can click on the highlighted field name for a brief Help description of the field.
5. Click **Apply**.

The **Add File** page has the following properties:

Property	Description
Document	Specifies the path and name of the file you want to upload from a local or network drive to DocuShare. <b>This is a required field.</b>
Title	Specifies the title for the new file. The title can contain spaces and other punctuation marks. You should assign a meaningful title to the file. <b>This is a required field.</b>
Summary	(Optional) Specifies a short description for the file. The contents of this field are displayed below the title of the file on the DocuShare collection page.
Max Versions	Specifies whether DocuShare provides version control for the file. You can specify the maximum number of versions of a file that are retained in DocuShare as a record of the file's history. Enter 1 to turn off versioning (only keep one copy of a file at a time). If you add more versions than this maximum value, the oldest version is deleted.
Description	(Optional) Specifies a detailed description of the file, such as an abstract. The description may include a summary of the purpose and the audience of the file.
Keywords	(Optional) Lets you specify one or more words associated with the file. Keywords help categorize the different files and streamline searches.
Restrict Write	If you select Yes, specifies that the new file is created with write access limited to the owner, rather than being inherited from the collection.
Author	Name of the document's author, which may be different from the owner submitting the file.

**Note:** There may be additional properties displayed on this page that are not listed here. They are specific to your DocuShare site. See your Site Administrator for details.

## **Adding Files to DocuShare Using the File UpHelper Application**

To add (or upload) a file to the DocuShare repository when using a web browser that is not file upload enabled (Microsoft Internet Explorer 2.0 or 3.0) you must have the **DocuShare File UpHelper** application installed on your computer. See [DocuShare UpHelper](#) in Chapter 1 for installation instructions. Users of upload-capable browsers can also use this application to upload files, especially if they wish to upload multiple files to the repository.

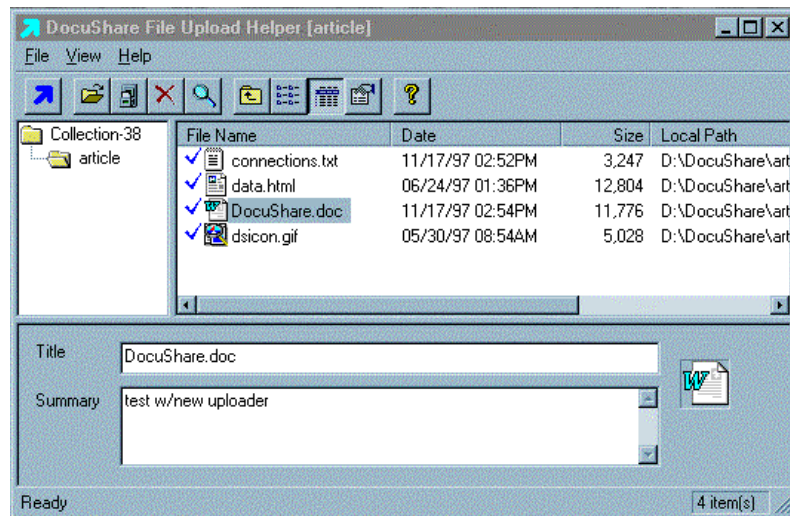
Your “**Use Helper for Upload**” attribute in User Properties must also be set to either **When Necessary** or **Always**. Netscape users using the UpHelper application should set the attribute to **Always**. You must be logged in to DocuShare and have at least **Writer** access permissions to the collection.

The UpHelper application for DocuShare supports drag-and-drop addition of files and directories from your file management application. You can drag a directory into the UpHelper window and the directory structure will be maintained. This directory structure will also be recreated after upload into DocuShare. The directory name will become the name of the new collection; the files and/or subdirectories located within that directory will be uploaded into DocuShare and placed in that new collection.

### **To add files to DocuShare using the File UpHelper application:**

1. In the collection where you are adding the files, click **Add File**. A **DocuShare Informational Message** screen appears. When you click the **Click here to initiate helper application** link, the DocuShare File Upload Helper dialog appears.
2. Use the **Browse** option from the **File** menu or the **yellow folder button** on the toolbar to navigate your file system and select one or more files to add. You may need to adjust the file types drop down box to view your selected file type. Click **Open** or **Accept** to select the file. The selected file displays in the Upload Helper dialog window (see below). You can repeat this process for any additional files you wish to upload.

You can also select a file or directory from your file management application and drag this over to the UpHelper window to add. The directory will appear as a sub-collection of the current collection in the left dialog window and the contents of this directory will appear in the right dialog window. Refer to the illustration below for an example.



3. For each file selected, specify a title and summary by clicking on the file name and editing the Title and Summary fields. The application automatically supplies a default title that is the file name without the extension. This title can be edited to a more meaningful title like “Minutes for 8/09/97 meeting.”
4. From the **File** menu, click **Upload All** to add all selected files, or select an individual file and click **Upload** to add just one file at a time. The **blue arrow button** on the toolbar can also be used to **Upload All** files.
5. A status screen appears which displays the progress of the uploading process.
6. When the upload process has completed, a final status window appears, giving you the option to **Stay** or **Exit**. **Stay** will leave UpHelper running, enabling you to send more file to the same Collection if you wish. The typical choice would be to **Exit**.
7. Return to the browser, where the **DocuShare Informational Message** screen appears. Click the **Click here to refresh your view of the collection** link to view the updated collection.

**Note:** After adding the file, you should check the **access permissions** for the file to make sure they provide the desired level of access for other users and groups. See the section [Viewing and Editing DocuShare Object Permissions](#) in Chapter 3 for more information on adjusting these permissions.

#### **Known problems adding files to DocuShare with the File UpHelper application:**

1. If the upload process appears to complete successfully, but the file is not visible within the DocuShare repository, check your proxy settings to be sure that you are **not** using a proxy server to access DocuShare. See “[Disabling Proxies](#)” in Chapter 1 for more information on proxy settings. Restart your browser and repeat the upload procedure after adjusting the proxy settings.

2. If you are using the Netscape browser and it hangs during uploading, check to see if the file is open in its associated application (for example, Word or PowerPoint). If the file is open, close it from the application, and then try uploading the file again.

## Viewing File Properties

You can view the properties of a file at any time. You do not need to be logged in to view the file properties. However, you must be logged in to DocuShare to perform any editing functions that can be accessed through the Services page.

To access a file's **Services** page, click on the **Services** icon to the right of file in the collection listing. The Services page will appear, listing the file properties.

Properties include:

- The title, summary, and description of the file
- For most document formats, an automatically-generated abstract of the file.
- The file's identifying object number (handle), the owner who created the file and the date and time of creation and last modification
- The location of this collection within the collection hierarchy of the DocuShare site (**Appears In**). All DocuShare objects may appear in one or more locations.

**Note:** There may be additional properties displayed on this page that are not listed here. They are specific to your DocuShare site. See your Site Administrator for details.

All of these properties (except the object ID, the creation/modification dates/times, and collection location) can be edited or modified by the owner of the file or a user with Writer access permissions through the **Edit Properties** function. To edit **Appears In** (collection location), use the **Edit Location** function.

The **Services** page provides access to editing and versioning functions, using these selections in the **Edit...** pull-down menu:

- **Delete** – Delete this file. You must be the owner of the file or have Manager access permissions to delete a file. See the section [Deleting a File](#) in this chapter for more information.
- **Permissions** – View the access permissions for this file. If you are the owner or have Manager access permissions, you can also edit the access permissions from here.
- **Edit Properties** – Edit the properties for this file. You must be the owner of the file or have at least Writer access permissions to edit file properties.
- **Edit Location** – Change (move) or add locations for this file. You must be the owner of the file or have at least Writer access permissions to change file locations. See the section [Editing the Location of a File](#) in this chapter for more information.

- **New Version** – Add a new version of this file.
- **History** – View the version history of this file. For information on the last three functions listed, see the section [Managing Files Through Versioning and Locking](#) in this chapter.
- **Lock/Unlock** – Lock or Unlock this file.

## Editing File Properties

Many properties of a file can be edited or modified after initial creation. You must be the owner of the file or have Writer access permissions to edit a collection's properties. You must also be logged in to DocuShare.

### To edit the properties of a file:

1. Click on the **Services** icon to the right of the collection listing. The **Services** page appears.
2. Select **Edit Properties** from the **Edit...** pull-down menu. The **Edit File** page appears.
3. Edit the information. Refer to the property descriptions in the table below for details on the properties that can be edited through this function.  
**Note:** If you are unsure of the purpose of a field while editing the file properties, you can click on the highlighted field name for a brief Help description of the field.
4. Click the **Apply** button. The **Services** page for the collection appears. The properties have now been updated to reflect your changes.

## Deleting a File

Only the owner of a file or a user with Manager access can delete a file from the DocuShare repository. You must be logged in to delete a file from DocuShare.

**Note:** Opening or saving a file on your local machine does **not** delete the file from the DocuShare repository.

### To delete a file:

1. Click the **Services** icon for the file you want to delete. The **Services** page appears.
2. Select **Delete** from the **Edit...** pull-down menu. The **Confirm Deletion** page appears.  
**Note:** If you change your mind about deleting this file, click **Back** in the browser to close the Confirm Deletion page.
3. Click **Delete** to confirm. The **Delete Successful** page appears.
4. Click the **Click here to continue** link to return to the page you started from.

The file is now deleted. You may need to **Reload** the page to see these changes.

## Restoring a Deleted File

If you inadvertently delete a file from the DocuShare repository, the Site Administrator can easily restore it for you. All deleted content is sent to a trashcan accessible only to the Site Administrator. If you mistakenly delete an object, you must contact the Site Administrator and provide him/her with the necessary information. The Site Administrator is responsible for purging the recycle bin on an as-needed basis. After purging, you will be unable to restore items deleted, so be sure to notify the Site Administrator of deletion restorations as soon as possible.

## View Files in HTML

The **View** option provides a conversion of files into HTML for immediate viewing without use of a helper application. Supported file types include word processing files such as Microsoft Word and image files such as TIFF. This conversion adds a **View** icon next to the **Services** icon for all files added to the DocuShare repository that can be converted in this manner. When you click on the **View** icon, the file in question is converted into HTML on the server and the converted document is then sent to your browser. This feature provides quick viewing access to the contents of files and does not require configuration of a helper application.

For a list of file formats that are supported by this feature, please see Readme.txt or contact your Site Administrator.

### To view a file:

1. Click the **View** icon for the file you want to view. The file appears in your browser window as an unformatted HTML file. Some file templates may provide frames and/or tables to display the contents of the file.
2. To close the View display, use your browser's **Back** button.

## Editing the Location of a File

The **Edit Location** command allows a user to move a DocuShare object from one location to another or allows the object to appear in multiple locations within the DocuShare repository. You must have at least Writer access to the object to change its location. The location of an object is displayed in the **Appears In** property, which is displayed at the end of each **Properties** listing for an object. Using the Edit Location command allows you to edit the **Appears In** property.

This is a helpful command if you have added a file (or any other DocuShare object) in the wrong location and want to move it instead of deleting it and then re-creating it. It is also helpful if you would like the same file to appear in one or more additional locations. All DocuShare objects can appear in multiple locations at once. However, there is actually only one physical copy of the object in the DocuShare database; the system simply creates additional pointers or references to the object.

A negative side effect of this command is that if used incorrectly, you can orphan the object. Orphaned objects still exist within the DocuShare repository but are not accessible to users. Only

a Site Administrator can recover orphaned objects.

### To edit the location of a file:

1. Click the **Services** icon for the file you want to delete. The **Services** page appears.
2. Select **Edit Location** from the **Edit** pull-down menu. The **Edit File Location** page appears.
3. For the **Appears In** field, a scrolling list is displayed that contains all DocuShare collections to which you have at least Writer access. The file's current location is highlighted.
  - To move a file, select the collection where you wish to move this file. The previous location will be deselected.
  - To have a file appear in multiple locations, press the CONTROL key while selecting the additional locations.

**Note:** Use the CONTROL key for MS Windows-based Operating Systems only. Substitute the Command (or Apple key) key for the MacOS. UNIX-based systems require no special key for this multiple list item selection.

**Note:** Use caution when deselecting locations. Deselecting improperly can create orphaned files. Be sure that at least **one** location is selected in the scrolling list before selecting the **Update Locations** button.

4. Click the **Update Locations** button.

The Services page for that file now appears and the new location(s) is/are displayed in **Appears In**. If you don't see this change reflected on the Services page, click **Reload** on your browser to refresh the page display.

## Managing Files through Versioning and Locking

DocuShare supports the complete range of a document's life cycle, including collaborative authoring of a series of drafts, and final archival publication of a completed work. When working on an important document over time, such as a product's functional requirements, you may want to retain an ongoing record of all past versions of the file. When working as part of a team, you may need a way to control who is currently working on a given file and thereby prevent the other team members from making conflicting edits. In many other cases, you may simply want to store and exchange individual copies of files without any of the traditional document management overhead. By using DocuShare's versioning and locking features, you can manage each individual file in the most appropriate way.

Version control maintains a record of a file's history. For each past version, it retains a copy of that version, the identity of the user who put that version into DocuShare and when it was done, and an optional user-supplied comment about that version. The number of past versions that are retained by DocuShare (i.e., the length of the file's history) is specified by the file's **Max Versions** property. Setting Max Versions to *N* causes DocuShare to retain at most the last *N*


versions. If  $N$  versions are currently stored, then adding a new version will cause the oldest version to be deleted. You can track and download a specific file version by viewing the file's **history**. All previous versions of the file are available for download and edit. You can change the value of Max Versions at any time, but this action does not reconstruct prior versions.

When you set Max Versions equal to one, versioning is effectively turned off and the history is empty.

If you are collaborating on a file with other users, you should **lock** the file in DocuShare when you are working on it. This is a standard document management procedure that indicates to other users that you are working on the file. Locking a file prevents other users from editing it at the same time and adding a new version. When you lock a file, a tiny padlock icon appears next to the file's **Services** icon. You can also **unlock** a file without creating a new version (discard any changes made since the last version).

You must be the owner of the file or have at least Writer level access to upload a new version of a file. You must also be logged in to DocuShare.

#### To edit and add a new version of a file to DocuShare using a web browser:

1. From within the collection listing, click on the file's CheckOut icon (). This will lock the file, preventing other users from editing it, and open it in the appropriate editor. Alternatively, you could click on the file's **Services** icon and from there, select **Lock** to lock the file and click on the file's Title to download the file to a temporary location on your computer.
2. When you are finished editing the file, on the file's **Services** page, select **New Version** from the **Edit...** pull-down menu. The **Upload New Version** page appears.
3. Click **Browse**.
4. Browse for and select the updated file, then click **Open** or **Accept**. The path to the edited file appears in the File field. You can also add comments in the **Comments** field.
5. Click **Apply**.
6. The **New Version Successful** page appears. Click the **Click here to continue** link.

The updated version of the file is now unlocked and in the DocuShare repository. You can verify that the updated version is in DocuShare by clicking on the file title to open it and check for your edits.

#### To unlock a file without adding a new version:

1. For the file you want to unlock, select **Unlock** from the **Edit...** pull-down menu on the **Services** page. The **Unlock Successful** page appears.
2. Click the **Click here to continue** link.

**To view the version history of a file:**

1. From the **Services** page, select **History** from the **Edit...** pull-down menu. A table with all version numbers, the date and time each file was created, its owner, and any associated comments are displayed.
2. Click on a version number to download that version of the file.

**Working with Files****Two tips to remember about files:**

1. Like all other DocuShare objects, files have an individual File Handle number, identifying them as unique objects within the DocuShare repository. Because each file is a unique object in the repository, even if you add a file that has the same name as another file, it will be a unique object in the repository. For example, you could have three files in your collection, all named “Test.” To DocuShare, they are all unique objects with different handle numbers.
2. If you are the owner of a file, you could download a file from the repository with the intention of updating the file to contain new information. You would have the file open in its helper application, perform the required updates and then select **Save** in your application. But selecting Save will **not** save this file back to the DocuShare repository; it will only save the file to your computer. To add this updated file to the repository, **you must upload the newly edited version of file to the repository**, using the procedures in [Adding Files](#) or [Managing Files Through Versioning and Locking](#). Alternatively, you can use the DocuShare Windows Client, which provides an on-line editing capability.

## 6 **DocuShare Calendars**

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- [Month View](#)
- [Week View](#)

### [Adding a Calendar](#)

### [Viewing Calendar Properties](#)

### [Editing Calendar Properties](#)

### [Deleting a Calendar](#)

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### [Adding a Calendar Event](#)

### [Editing Calendar Event Properties](#)

### [Deleting a Calendar Event](#)

### [Editing the Location of a Calendar Event](#)

## **Calendar Overview**

DocuShare also has the ability to create online **calendars**. They are represented by a  icon. You can use a DocuShare online calendar as a personal calendar or as a shared, group calendar.

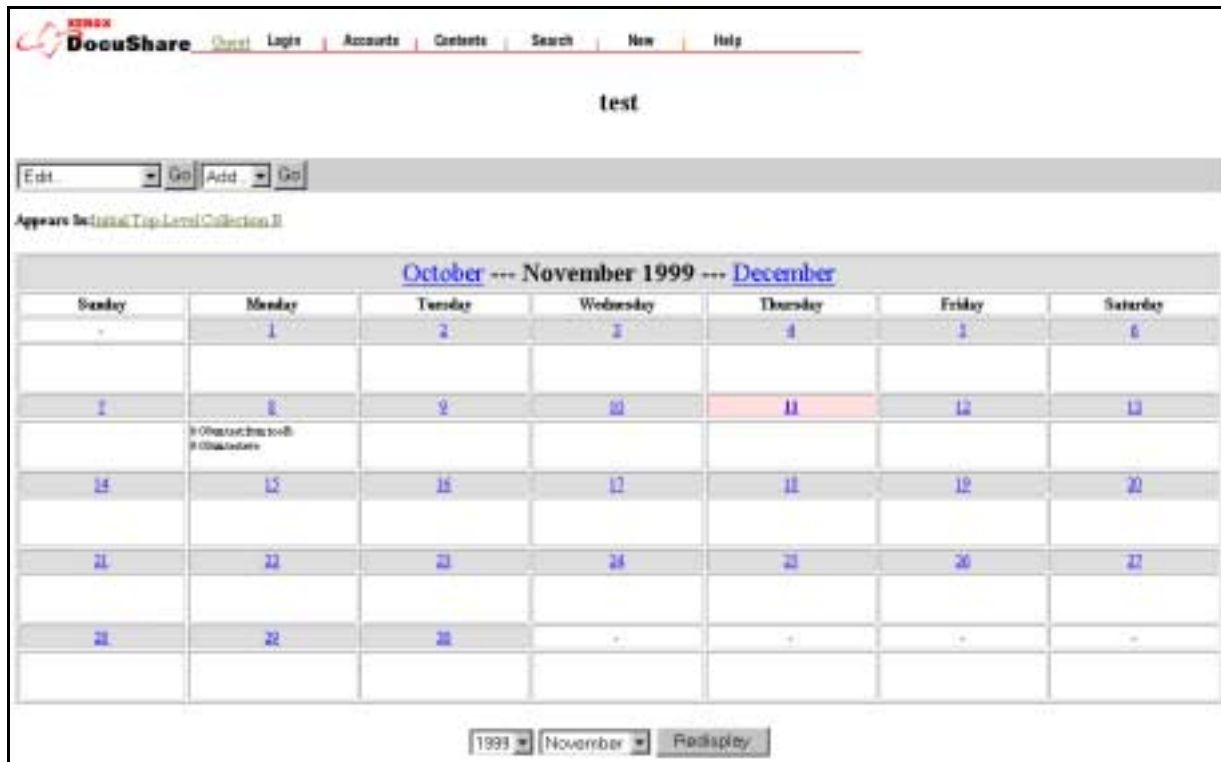
Calendar entries are called **Events**. Each event is associated with a specific day, or with a specific sequence of days, such as every Monday for six weeks. As with all DocuShare objects, events have a title, description, and the standard set of permission attributes. By default, an event's permissions are inherited from the calendar, but they can be individually modified to create various kinds of public and private events, for example.

Calendars have two view options: one month at a time or one week at a time. One editable property of a calendar is which view to use as the default when the calendar is initially opened.

When first opened, a calendar will display either the current month or week, with the current day highlighted.

## Month View

An example calendar in Month view is shown in the following example.



In the Month view, a calendar displays all the days in a specified month, with the first three events of each day displayed in an abbreviated manner. The toolbar includes a button that will take you to a week view for that month. If it is the current month, the week view button will display the current week. Otherwise, it will display the first week of the month. Use the highlighted month names to navigate forward or backward in the calendar.

To add an event to or display details about a specific day, click on the day number link. An Event page for the selected day appears, as shown in the following example.

**DocuShare** [Home](#) [Login](#) [Accounts](#) [Contents](#) [Search](#) [New](#) [Help](#)

[Millenium Calendar](#) - Friday, 31 December, 1999

8:00pm-11:00pm [Millenium Party](#) [Add Event](#) [Services](#)

**Add Event for December 31, 1999**

**Title:**

(required)

**Description:**

**Date:**

**Time:** ☐ No Time

☐ am ☐ pm

☐ pm

**Repeat:**  for a total of  occurrence(s)

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Existing events are listed in a table at the top of the page. You can click on the **Services** link to display or edit the properties of an existing event. Below that table is a form to add new events for that day. To return to the current calendar view, click the highlighted calendar name link at the top of the Event page.

## Week View

**DocuShare** [Home](#) [Login](#) [Accounts](#) [Contents](#) [Search](#) [New](#) [Help](#)

test

Appears in [Global Top Level Collection](#)

**Week Starting Monday, November 08, 1999**

Monday November 08, 1999	<input type="button" value="Add Event"/>	8:00am-9:00am test Event today 9:00am-10:00am test Event	<a href="#">Add Event</a> <a href="#">Services</a>
Tuesday November 09, 1999	<input type="button" value="Add Event"/>		
Wednesday November 10, 1999	<input type="button" value="Add Event"/>		
Thursday November 11, 1999	<input type="button" value="Add Event"/>		
Friday November 12, 1999	<input type="button" value="Add Event"/>		
Saturday November 13, 1999	<input type="button" value="Add Event"/>		
Sunday November 14, 1999	<input type="button" value="Add Event"/>		

The figure shows an example calendar in Week view. In the Week view, a calendar displays all the days in a specific week, starting with Monday and ending with Sunday. Each day contains a complete listing for all of the events in that day, including the events' complete title and description. To display or edit the properties of an existing event, click on its **Services** icon. To add an event to a specific day, select the **Add Event** button for the desired day.

The toolbar includes a button that will take you to the month view containing the week currently displayed. Use the **Previous** and **Next** buttons to move to the previous and next week, respectively. Use the **Today** button to move to the current week. The current day will be highlighted.

## Adding a Calendar

You can add a calendar to any collection in DocuShare to which you have at least Writer access permissions. However, you must be logged in to DocuShare to create a calendar.

### To add a calendar:

1. In the collection where you want to add the calendar, select **Calendar** from the **Add...** pull-down menu. The **Add Calendar** page appears.
2. Fill in the page. Refer to the property descriptions in the table below for descriptions of each field.  
**Note:** If you are unsure of the purpose of a field while creating the calendar, you can click on the highlighted field name for a brief Help description of the field.
3. Click the **Apply** button. The calendar is created in DocuShare and the **Services** page for the calendar appears.

The **Add Calendar** page has the following properties:

Property	Description
Title	Specifies a descriptive title for the calendar. The title can contain spaces and other punctuation marks. You should assign a meaningful title to the calendar. The default title is New. <b>This is a required field.</b>
Summary	(Optional) Specifies a short description of the calendar. The contents of this field are displayed below the calendar title on the corresponding DocuShare collection page. Use the Description field to provide a more detailed description of the calendar.
Description	(Optional) Specifies a detailed description of the calendar. The contents of this field are displayed below the calendar title and summary on the DocuShare page. The Description field can contain HTML code to customize the calendar's appearance.
Keywords	(Optional) Lets you specify one or more words associated with the file. Keywords help categorize the different files and streamline searches.
Default View	(Optional) Specifies the default calendar view: by Month or by Week. The user can

toggle between Month and Week view from within an open calendar.

**Note:** There may be additional properties displayed on this page that are not listed here. They are specific to your DocuShare site. See your Site Administrator for details.

You can verify that the calendar was created by clicking the **Appears In** link to move you up one level in the collection hierarchy. The calendar should now be listed with a **NEW** icon. If you don't see the calendar, click **Reload** on your browser to refresh the page display.

**Note:** After creating the calendar, you should adjust the **access permissions** for the calendar to make sure they provide the desired level of access for other users and groups. See the section [Viewing and Editing DocuShare Object Permissions](#) in Chapter 3 for more information on adjusting these permissions.

## Viewing Calendar Properties

You can view the properties of a calendar at any time. You do not need to be logged in to view a calendar's properties. However, you must be logged in to DocuShare to perform any editing functions that can be accessed through the Calendar Services page.

To access a calendar's **Services** page, click on the **Services** icon to the right of the calendar in the collection listing. If you are in an open calendar, select **View Properties** from the **Edit...** pull-down menu.

Calendar properties include:

- All of the properties listed in the previous section
- The calendar's identifying object number (handle), the owner who created the calendar, and the date and time of creation and last modification
- The location of this calendar within the collection hierarchy of the DocuShare site (**Appears In** property). All DocuShare objects may appear in multiple locations.

All of these properties (except the object ID, the creation/modification dates/times, and calendar location) can be edited or modified by the owner of the calendar or a user with Writer access permissions through the **Edit Properties** function.

Use the **Edit Location** function on main calendar toolbar to edit the **Appears In** property (calendar location).

The **Services** page provides access to editing functions, using these selections in the **Edit...** pull-down menu:

- **Permissions** – View the access permissions for this calendar.  
If you are the owner or have Manager access permissions, you can also edit the access permissions from here.

- **Edit Location** – Change (move) or add locations for this calendar.  
You must be the owner of the calendar or have at least Writer access permissions to change calendar locations. See the section [Editing the Location of a Calendar](#) in this chapter for more information.
- **Edit Properties** – Edit the properties for this calendar.  
You must be the owner of the calendar or have at least Writer access permissions to edit calendar properties.

## Editing Calendar Properties

You can edit the properties of a calendar at any time by selecting **Edit Properties** from the calendar's **Edit** pull-down menu. You must be the owner of the calendar or have Writer access permissions to edit a calendar's properties. You must also be logged in to DocuShare.

### To edit the properties of a calendar:

1. Click the **Services** icon for the calendar whose properties you want to edit. The **Calendar Services** page appears.
2. Select **Edit Properties** from the **Edit...** pull-down menu. The **Edit Calendar** page appears.
3. Edit the calendar properties. Refer to the property descriptions from the table in the previous section for information.  
**Note:** If you are unsure of the purpose of a field while editing the calendar, you can click on the highlighted field name for a brief Help description of the field.
4. Click **Apply**. The Services page for the calendar appears. The calendar properties are updated to reflect your edits.

**Note:** There may be additional editable properties displayed on this page that are not listed here. They are specific to your DocuShare site. See your Site Administrator for details.

## Deleting a Calendar

Only the owner of a calendar or a user with Manager access for that calendar can delete a calendar from DocuShare. You must be logged in to DocuShare to delete a calendar.

### To delete a calendar:

1. Open the calendar that you want to delete.
2. Select **Delete** from the **Edit...** pull-down menu.
3. If there are no objects in the calendar, the **Confirm Deletion** page appears. Select the **Delete** button to delete the calendar.

If the calendar contains other objects the **Delete** page appears. This page lists the number of event objects in the calendar that will be deleted. It also lists the number of objects that

will not be deleted because of insufficient access rights or because they appear in other locations.

- To delete the calendar and its contents, select the **Delete Object and Contents** button.
- To delete just the calendar, select the **Delete Just this Object** button.

**Note:** If you change your mind about deleting this calendar, use the **Back** button on your browser to close the Delete or Confirm Deletion page.

4. The **Delete Successful** page appears. Click the **Click here to continue** link.

The calendar is now deleted. You may need to **Reload** the page to see these changes.

### ***Restoring a Deleted Calendar***

If you inadvertently delete a calendar from the DocuShare repository, the Site Administrator can easily restore it for you. All deleted content is sent to a trashcan accessible only to the Site Administrator. If you mistakenly delete an object, you must contact the Site Administrator and provide him/her with the necessary information. The Site Administrator is responsible for purging the recycle bin on an as-needed basis. After purging, you will be unable to restore items deleted, so be sure to notify the Site Administrator of deletion restorations as soon as possible.

### ***Editing the Location of a Calendar***

The **Edit Location** command allows a user to move a DocuShare object from one location to another or allows the object to appear in multiple locations within the DocuShare repository. You must have at least Writer access to the object to change its location.

The location of an object is displayed in the **Appears In** property, which is displayed at the end of each **Properties** listing for an object. Using the Edit Location command allows you to edit the **Appears In** property.

This is a helpful command if you have created a calendar (or any other DocuShare object) in the wrong location and want to move it instead of deleting it and then re-creating it. It is also helpful if you would like the same object to appear in one or more additional locations. All DocuShare objects can appear in multiple locations at once. However, there is actually only one physical copy of the object in the DocuShare database; the system simply creates additional pointers or references to the object.

A negative side effect of this command is that if used incorrectly, you can orphan the object. Orphaned objects still exist within the DocuShare repository but are not accessible to users. Only a Site Administrator can recover orphaned objects.

#### **To change the location of a calendar:**

1. Click the **Services** icon for the calendar whose location you want to change. The **Calendar Services** page appears.

2. Select **Edit Location** from the **Edit** pull-down menu. The **Edit Calendar Location** page appears.
3. For the **Appears In** field, a scrolling list is displayed that contains all DocuShare collections to which you have at least Writer access. The calendar's current location is highlighted.
  - To move an object, select the collection where you wish to move this object. The previous location will be deselected.
  - To have an object appear in multiple locations, press the CONTROL key while selecting the additional locations.  
**Note:** Use the CONTROL key for MS Windows-based Operating Systems only. Substitute the Command (or Apple key) key for the MacOS. UNIX-based systems require no special key for this multiple list item selection.

**Note:** Use caution when deselecting locations. Deselecting improperly can create orphaned files. Be sure that at least **one** location is selected in the scrolling list before selecting the **Update Locations** button.
4. Click the **Update Locations** button.

The Services page for that calendar now appears and the new location(s) is/are displayed in **Appears In** property. If you don't see this change reflected on the Services page, click **Reload** on your browser to refresh the page display.

## Adding a Calendar Event

You can add a calendar event to any calendar in DocuShare to which you have Writer access permission. You must be logged in to DocuShare create a calendar event.

You can also repeat DocuShare calendar events over a series of days/weeks/months. For example, if you have a meeting every two weeks, you can simply specify the meeting as repeating every two weeks, without having to enter each occurrence of the meeting.

### To add a calendar event:

1. Open the calendar where you want to add an event. If the calendar is in month view, click the date for the event. If the calendar is in week view, select **Add Event** for the date you want. The **Add Event** page appears.
2. Specify the event information. Refer to the table below for descriptions of each field.  
**Note:** If you are unsure of the purpose of a field while creating the calendar event, you can click on the highlighted field name for a brief Help description of the field.
3. Click the **Apply** button.

The **Add Event** page has the following properties:

Property	Description
Title	Specifies a descriptive title for the calendar event (for example, "Meet with Joe").

The title can contain spaces and other punctuation marks. You should assign a meaningful title to the calendar event. The default title is New. Only the first fifteen characters of the title are displayed on the calendar's month view. **This is a required field.**

Description	(Optional) Specifies a detailed description of the calendar event (e.g., "Meeting in conference room 218; bring bagels and juice!").
Date	Specifies the year, month, and day for the event.
Time	Specifies the start and end time for the event, in quarter-hour increments. Radio buttons allow selection of a.m. or p.m. For events that will occur for an entire day, select <b>No Time</b> .
Repeat	Specifies whether the event repeats: daily, weekly, every two weeks, monthly, or by date. Also specifies the number of times that the event repeats.

**Note:** There may be additional properties displayed on this page that are not listed here. They are specific to your DocuShare site. See your Site Administrator for details.

The event is created in the DocuShare calendar and the **Services** page for the event appears.

You can verify that the event was created by clicking the **Appears In** link to move you to the default calendar view. If you don't see the collection, click **Reload** on your browser to refresh the page display.

**Note:** After creating the event, you should view the **access permissions** for the event to make sure they provide the desired level of access for other users and groups. See the section [Viewing and Editing DocuShare Object Permissions](#) in Chapter 3 for more information on adjusting these permissions.

## ***Editing Calendar Event Properties***

You can edit the properties of a calendar event at any time by selecting **Edit Properties** from the **Edit** pull-down menu on the calendar event's Services page. For repeating events, you can specify to edit all of the events in the series, or just the selected event.

You must be the owner of the calendar event or have at least Writer access permissions to edit event properties. You must also be logged in to DocuShare.

### **To edit the properties of a calendar event:**

1. Open the calendar with the event you want to edit.
2. Click the date for the event. The **Add Event** page appears.
3. In the event list table, click the **Services** icon for the event whose properties you want to edit. The **Services** page appears.
4. Select **Edit Properties** from the **Edit...** pull-down menu. The **Edit Event** page appears.

5. Edit the information. Refer to the property descriptions in the previous section for information.  
**Note:** If you are unsure of the purpose of a field while editing the calendar event, you can click on the highlighted field name for a brief Help description of the field.
6. Click the **Apply** button. The **Services** page for the event appears. The event properties have now been updated to reflect your changes.

**Note:** There may be additional properties displayed on this page that are not listed here. They are specific to your DocuShare site. See your Site Administrator for details.

## ***Deleting a Calendar Event***

Only the owner of a calendar event or a user with Manager permission for the event can delete it from DocuShare. For repeating events, you can specify to delete all of the events in the series, or just the selected event. You must be logged in to DocuShare to delete events.

### **To delete a calendar event:**

1. Go to the day on which the event occurs. For example, in Month view, click on the relevant day.
2. Click the **Services** icon for the calendar event you want to delete. The **Services** page appears.
3. Select **Delete** from the **Edit...** pull-down menu.
4. If this is the only instance of this event, the **Confirm Deletion** page appears. Select the **Delete** button to delete the event.  
 If this is a repeating event, the **Delete** page appears. This page lists the number of events that will be deleted.
  - To delete all repeating events, select **Delete All Events in This Series** button.
  - To delete just this event select the **Delete Just This Event** button.

**Note:** If you change your mind about deleting this collection, use the **Back** button on your browser to close the Delete or Confirm Deletion page.

5. The **Delete Successful** page appears. Click the **Click here to continue** link.

The event is now deleted. You may need to **Reload** the page to see these changes.

**Note:** If you delete an entire series, or a non-repeating event, it can easily be restored by the Site Administrator. However, if you delete a single event out of a repeating series, it is permanently deleted and cannot be restored.

## Editing the Location of a Calendar Event

Just as in other DocuShare objects, the **Edit Location** command allows a user to move a DocuShare event from one calendar to another or allows the event to appear in multiple calendars within the DocuShare repository. There is only one physical copy of the event in the DocuShare database; the system simply creates additional pointers or references to it.

You must have at least Writer access to the object to change its location. You must also be logged in to DocuShare.

The location of an object is displayed in the **Appears In** property, which is displayed at the end of each **Properties** listing for an object. Using the Edit Location command allows you to edit the **Appears In** property.

Editing the location of a calendar event enables creating group or shared calendars. You can create an event in your own calendar and then edit its location to appear in your calendar **and** your workgroup's shared calendar.

A negative side effect of this command is that if used incorrectly, you can orphan the event. Orphaned objects still exist within the DocuShare repository but are not accessible to users. Only a Site Administrator can recover orphaned objects.

### To change the location of a calendar event:

1. Go to the day on which the event occurs. For example, in month view, click on the relevant day.
2. Click the **Services** icon for the calendar event whose location you want to change. The **Services** page appears.
3. Select **Edit Location** from the **Edit...** pull-down menu. The **Edit Event Location** page appears.
4. For the **Appears In** field, a scrolling list is displayed that contains all DocuShare calendars to which you have at least Writer access. The calendar's current location is highlighted.
  - To move an event, select the calendar where you wish to move this event. The previous location will be deselected.
  - To have an event appear in multiple calendars, press the CONTROL key while selecting the additional calendar(s).

**Note:** Use the CONTROL key for MS Windows-based Operating Systems only. Substitute the Command (or Apple key) key for the MacOS. UNIX-based systems require no special key for this multiple list item selection.

**Note:** Use caution when deselecting locations. Deselecting improperly can create orphaned events. Be sure that at least **one** location is selected in the scrolling list before selecting the **Update Locations** button.

5. Click the **Update Locations** button.

The Services page for that calendar event now appears and the new location(s) is/are displayed in **Appears In**. If you don't see this change reflected on the Services page, click **Reload** on your browser to refresh the page display.

## 7 **DocuShare Subscriptions**

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### **Subscription Overview**

DocuShare allows users to subscribe to DocuShare content and be notified by email when changes occur. As with all DocuShare objects, subscriptions have a title, description, and the standard set of permission attributes. Unlike the other DocuShare objects, however, subscriptions do not *appear in* collections or other container objects. Subscriptions to DocuShare objects can be created and managed through those objects' Edit menu.

Subscriptions provide a variety of options to specify which events are of interest, who should be notified when those events occur, and when email notifications will be sent. The subscription **Events of Interest** property lists which modifications (e.g., *Any Change*, *Something Deleted*) will be reported to the subscription recipients. The subscription **Period** property indicates when the notifications will be sent, and may be on an *Immediate*, *Daily*, or *Weekly* basis. All daily and weekly notices scheduled to be received by each recipient are combined into a single summary report. The recipients of a subscription may be changed on an as-needed basis through the Edit Recipients option on the subscription's Edit menu.

When a subscription is made to a container object, such as a collection, it applies to the collection and everything within that collection. When a subscription is made to individual, non-container objects, such as a file, it applies only to that individual object.

### **Subscription Events of Interest**

Each subscription lists the specific set of change events that are of interest to the recipients. Subscriptions can be made for all changes, a limited set of changes, or just one type of change.

The set of possible event types are:

Event	Description
Any change	The <b>Any Change</b> event type covers all possible changes and subsumes all other events types.
Something added	A new object has been added. This event type applies to container objects only, such as collections.
A new version	A new version has been added to a file. This event type applies to collection and file objects.
Something deleted	An object within the scope of the subscription, such as a collection's contents or the subscribed-to object itself, was deleted.
Properties edited	The properties of an object, such as its title or description, were edited.
Permissions edited	The permissions of an object, including who has read, write or manager permission, were edited.
Change in ownership	The owner of an object was changed.
Location edited	An object was moved. This event type will include moving something out of or into the scope of the subscription, such as moving a file into a subscribed-to collection or out of a subscribed-to collection.
File locked or checked out	A file has been locked for editing. A file may be locked explicitly via the <b>Lock</b> option on its <b>Services</b> page, or as a side-effect of having been checked out.
File unlocked	A file has been unlocked. This event applies only to files that have been explicitly UnLocked without addition of a new version.

## Adding a Subscription

Any user with Read access to an object may create a subscription to that object. If the object is a container, such as a collection, the subscription includes changes to the collection and its contents.

### To add a subscription:

1. Go to the collection or object to be modified. From the **Edit...** pull-down menu, click on **Subscriptions**. The **Add Subscription** page appears.
2. Fill in the page. Refer to the property descriptions in the table below for descriptions of each field.

**Note:** If you are unsure of the purpose of a field while creating the subscription, you can click on the highlighted field name for a brief Help description of the field.

**Note:** To select more than one parameter, press the CONTROL key while clicking on the additional parameters.

3. Click **Apply**.

4. The subscription is created in DocuShare and the **Subscription Services** page appears.

The Add Subscription page has the following properties:

Property	Description
Events of Interest	The DocuShare events about which you would like to be notified. <b>This is a required field.</b>
Period	The period property specifies when you would like to be notified about the events of interest. The value <i>Immediate</i> indicates that you want to receive notification immediately after the event occurs. The value <i>Daily</i> indicates that you want the event to be included in a daily summary report. The value <i>Weekly</i> indicates that you want the event to be included in a weekly summary report.
Include Recipient's Activity	A subscription will notify its recipients of all events of interest. The value <i>No</i> indicates that a recipient should not be notified of her/his own activity. Setting this property to <i>No</i> avoids receiving email about edits that you made yourself.

### Viewing Subscription Properties

To view the properties of a subscription, you must access the Services page by clicking on the **View Properties** option in the **Edit...** pull-down menu, or by clicking on the Services icon to the right of the link. Subscription properties include:

- All of the properties listed in the previous section (see [Adding a Subscription](#))
- The subscription's title, summary, description, keywords, handle, owner, create and modified dates, who modified the subscription, the publisher, and the recipients of the subscription.

### Editing Subscription Properties

You can edit the properties of a subscription by selecting **Edit Subscription** from the **Edit...** pull-down menu, or by clicking on the Services icon. The **Edit Subscription** page contains the following properties:

Property	Description
Title	This field should contain the title of the object being submitted to the DocuShare repository. The title should be short but descriptive and may contain spaces and other punctuation marks. <b>This is a required field.</b>
Summary	(Optional) This field should contain a short description of the object being submitted to the DocuShare repository. The contents of this field will be displayed beneath the object's title when printing the contents of a Collection in which this object appears. The Description field may be used to provide a more detailed description of the object.

Description	(Optional) This field should contain a detailed description of the object. For Collections and other container-type objects, the contents of this field will be displayed at the top of the page, just below the title and/or image associated with the object. If desired, this field may contain HTML markup that will be inserted into the page without modification.
Keywords	This field should contain any Keywords associated with this object. Keywords help to categorize documents and allow for more accurate searching. Simply type in a series of words in the field.
External Recipients	A list of email addresses for recipients who are not registered users on this DocuShare server. External recipients will always be sent immediate email in plain-text format. Daily or weekly summary reports are not available for external recipients.
Events	The DocuShare events about which you would like to be notified. To select more than one event, press the CONTROL key while selecting the additional events. <b>This is a required field.</b>  <b>Note:</b> Use the CONTROL key for MS Windows-based Operating Systems only. Substitute the Command (or Apple key) key for the MacOS. Unix-based systems require no special key for this multiple list item selection.
Period	The period property specifies when you would like to be notified about the events of interest. The value <i>Immediate</i> indicates that you want to receive notification immediately after the event occurs. The value <i>Daily</i> indicates that you want the event to be included in a daily summary report. The value <i>Weekly</i> indicates that you want the event to be included in a weekly summary report.
Include Recipient's Activity	A subscription will notify its recipients of all events of interest. The value <i>No</i> indicates that a recipient should not be notified of her/his own activity. Setting this property to <i>No</i> avoids receiving email about edits that you made yourself.

### To edit properties of a subscription:

1. In the **Edit...** pull-down menu, select **Edit Properties**.  
**Note:** If you are not automatically taken to the Edit Properties page, click the **Go** button.
2. Edit the subscription properties. Refer to the property descriptions from the above table for information.  
**Note:** If you are unsure of the purpose of a field while editing subscription properties, you can click on the field name for a brief Help description of that field.
3. Click the **Apply** button. The Services page appears for that subscription, and the properties are updated to reflect your changes.

## Editing Recipients of a Subscription

DocuShare allows managers of a subscription to add and remove users or groups from a

subscription.

#### To add or remove users from a subscription:

1. Click on **Edit Recipients** from the **Edit...** pull-down menu.
  - To add a recipient to the subscriber list, highlight or type the user's name in the **Add Recipients** box.
  - To remove a recipient from the subscriber list, highlight or type the user's name in the **Remove Recipients** box.
  - Enter a comma-separated list of email addresses to include recipients who are not registered users.
2. Click **Apply**. The **Subscription Services** page appears, and your changes will be reflected.

### ***Deleting a Subscription***

#### To delete a subscription:

1. Open the subscription that you want to delete.
2. Select **Delete** from the **Edit...** pull-down menu.
3. The **Confirm Deletion** page appears. Click on the **Delete** button to delete the subscription.

**Note:** If you decide that you do not want to delete the subscription, click the **Back** button on your browser to close the Delete or Confirm Deletion page.

4. The **Delete Successful** page appears. Click the **Click here to continue** link to continue working in DocuShare.

### ***Restoring a Deleted Subscription***

If you inadvertently delete an object from the DocuShare repository, the Site Administrator can easily restore it for you. All deleted content is sent to a trashcan accessible only to the Site Administrator. If you mistakenly delete an object, you must contact the Site Administrator and provide him/her with the necessary information. The Site Administrator is responsible for purging the recycle bin on an as-needed basis. After purging, you will be unable to restore items deleted up to that point, so be sure to notify the Site Administrator of deletion restorations in a timely manner.

## 8 DocuShare URLs

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You can also save **URL** (Uniform Resource Locator) links in DocuShare. They are represented by a  icon. You can think of a DocuShare URL as a shared bookmark.

### Adding a URL

URLs can be added to any collection in DocuShare to which you have Writer access. You must be logged in to DocuShare to add a URL.

#### To add a URL:

1. In the collection where you want to add the URL, click the **Add URL** selection in the **Add...** pull-down menu. The **Add URL** page appears.
2. Fill in the URL information: title, summary, and URL. Refer to the property descriptions in the table below for descriptions of each field.
3. When you are finished, click the **Apply** button. The URL is created in DocuShare and the **Services** page appears.


The **Add URL** page has the following properties:

Property	Description
Title	Specifies a descriptive title for the URL being submitted to the DocuShare repository. The title can contain spaces and other punctuation marks. You should assign a meaningful title to the URL. The default title is New. <b>This is a required field.</b>
Summary	(Optional) Specifies a brief description of the URL being submitted to the DocuShare repository. The contents of this field appear below the URL title when you display the contents of the DocuShare collection that contains the URL.
URL	Specifies the URL of the Web document you wish to reference (e.g., <a href="http://www.xerox.com">http://www.xerox.com</a> ). Must be the fully qualified URL (i.e., including the “http://” portion of the reference). The URL can be for any valid internet protocol in addition to HTTP, such as FTP,

Gopher, mailto, news, TELNET, WAIS, or file. **This is a required field.**

An easy method to record the correct URL for a Web site or Document is to first go to that location in your browser. You can then copy the URL from your browser and paste it into the DocuShare URL field.

**Note:** There may be additional properties displayed on this page that are not listed here. They are specific to your DocuShare site. See your Site Administrator for details.

You can verify that the URL was created by clicking the **Appears In** link to move you up one level in the collection hierarchy. The URL should now be listed with a  icon. If you don't see the URL, click **Reload** on your browser to refresh the page display.

**Note:** After creating the URL, you should adjust the **access permissions** for the URL to make sure they provide the desired level of access for other users and groups. See the section [Viewing and Editing DocuShare Object Permissions](#) in Chapter 3 for more information on adjusting these permissions.

## Viewing URL Properties

You can view the properties of a URL at any time. You do not need to be logged in to view a URL's properties. However, you must be logged in to DocuShare to perform any editing functions that can be accessed through the View URL Services page.

To access a URL's **Services** page, click on the **Services** icon to the right of the URL in the collection listing.

Properties for a URL include:

- All of the properties listed in the previous section (see table above).
- The URL's identifying object number (handle), the owner who created the URL and the date and time of creation and last modification.
- The location of this URL within the collection hierarchy of the DocuShare site (**Appears In** property). All DocuShare objects may appear in multiple locations.

All of these properties (except the object ID, the creation/modification dates/times and URL location) can be edited or modified by the owner of the URL or a user with Writer access permissions through the **Edit Properties** function. Use the **Edit Location** function to edit the **Appears In** property (URL location).

The **Services** page provides access to editing functions, using these selections in the **Edit...** pull-down menu:

- **Delete** – Delete this URL. You must be the owner of the URL or have Manager access permissions to delete a URL. See the section [Deleting a URL](#) in this chapter for more information.

- **Permissions** – View the access permissions for this URL.  
If you are the owner or have Manager access permissions, you can also edit the access permissions from here.
- **Edit Location** – Change (move) or add locations for this URL.  
You must be the owner of the URL or have at least Writer access permissions to change URL locations. See the section [Editing the Location of a URL](#) in this chapter for more information.
- **Edit Properties** - Edit the properties for this URL.  
You must be the owner of the URL or have Writer access permissions to edit URL properties.

### **Editing URL Properties**

You can edit the properties of a URL at any time by selecting **Edit Properties** from the **Edit...** pull-down menu on the **URL Services** page. You must be the owner of the URL or have at least Writer access permissions to edit a URL's properties. You must also be logged in to DocuShare.

#### **To edit the properties of a URL:**

1. Click the **Services** icon for the URL whose properties you want to edit. The **URL Services** page appears.
2. Select **Edit Properties** from the **Edit...** pull-down menu. The **Edit URL** page appears.
3. Edit the URL properties. Refer to the property descriptions in the previous section for information.  
**Note:** While editing the URL properties, if you are unsure of the purpose of a field, you can click on the highlighted field name for a brief Help description of the field.
4. Click **Apply**. The Services page for the URL appears. The URL properties are updated to reflect your edits.

**Note:** There may be additional, editable properties displayed on this page that are not listed here. They are specific to your DocuShare site. See your Site Administrator for details.

### **Deleting a URL**

Only the owner of a URL (the user who added it to DocuShare) or a user with Manager access for that URL can delete a URL from DocuShare. You must be logged in to DocuShare to delete a URL.

#### **To delete a URL:**

1. Click the **Services** icon for the URL you are deleting. The **URL Services** page appears.
2. Select **Delete** from the **Edit...** pull-down menu. The **Confirm Deletion** page appears.  
**Note:** If you change your mind, click **Back** on the browser to close the Confirm Deletion page.

3. Click the **Delete** button. The **Delete Successful** page appears.
4. Click the **Click here to continue** link.

The URL is now deleted. You may need to **Reload** the page to see these changes.

### ***Restoring a Deleted URL***

If you inadvertently delete a URL from the DocuShare repository, the Site Administrator can easily restore it for you. All deleted content is sent to a trashcan accessible only to the Site Administrator. If you mistakenly delete a URL, you must contact the Site Administrator and provide him/her with the necessary information. The Site Administrator is responsible for purging the trashcan on an as-needed basis. After purging, you will be unable to restore items deleted, so be sure to notify the Site Administrator of deletion restorations as soon as possible.

### ***Editing the Location of a URL***

The **Edit Location** command allows a user to move a DocuShare object from one location to another or allows the object to appear in multiple locations within the DocuShare repository. You must have at least Writer access to the object to change its location.

The location of an object is displayed in the **Appears In** property, which is displayed at the end of each **Properties** listing for an object. Using the Edit Location command allows you to edit the **Appears In** property.

This is a helpful command if you have created a URL (or any other DocuShare object) in the wrong location and want to move it instead of deleting it and then re-creating it. It is also helpful if you would like the same object to appear in one or more additional locations. All DocuShare objects can appear in multiple locations at once. However, there is actually only one physical copy of the object in the DocuShare database; the system simply creates additional pointers or references to the object.

A negative side effect of this command is that if used incorrectly, you can orphan the object. Orphaned objects still exist within the DocuShare repository but are not accessible to users. Only a Site Administrator can recover orphaned objects.

#### **To change the location of a URL:**

1. Click the **Services** icon for the URL whose location you want to change. The **URL Services** page appears.
2. Select **Edit Location** from the **Edit...** pull-down menu. The **Edit URL Location** page appears.
3. For the **Appears In** field, a scrolling list is displayed that contains all DocuShare collections to which you have at least Writer access. The URL's current location is highlighted.
  - To move an object, select the collection where you wish to move this object. The

previous location will be deselected.

- To have an object appear in multiple locations, press the CONTROL key while selecting the additional locations.  
**Note:** Use the CONTROL key for MS Windows-based Operating Systems only. Substitute the Command (or Apple key) key for the MacOS. Unix-based systems require no special key for this multiple list item selection.

**Note:** Use caution when deselecting locations. Deselecting improperly can create orphaned files. Be sure that at least **one** location is selected in the scrolling list before selecting the **Update Locations** button.

4. Click the **Update Locations** button.

The **URL Services** page now appears and the new location(s) is/are displayed in **Appears In**. If you do not see this change reflected on the Services page, click **Reload** on your browser to refresh the page display.

## 9 DocuShare Bulletin Boards

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### Overview

DocuShare can also create online **Bulletin Boards**. They are represented by a  icon. You can think of a DocuShare bulletin board as a place where users can post notices or messages or maintain a running exchange of ideas. An example bulletin board is shown below.

Users can add new **bulletins** to the bulletin board. These bulletins appear in reverse chronological order. Although bulletins have titles, DocuShare does not support threaded discussions within a bulletin board. Setting an expiration period for the bulletins ranging from one hour to two months to never can age a bulletin board. A bulletin board is considered a **container object** because they hold bulletin objects.

### Adding a Bulletin Board

You can add a Bulletin Board to any collection in DocuShare to which you have at least Writer access permissions. However, you must be logged in to DocuShare to create a bulletin board.

#### To add a Bulletin Board:


1. In the collection where you want to add the bulletin board, select **Add Bulletin Board** from the **Add...** pull-down menu. The **Add Bulletin Board** page appears.

2. Fill in the page. Refer to the property descriptions in the table below for descriptions of each field.
3. Click the **Apply** button.

The **Add Bulletin Board** page has the following properties:

Property	Description
Title	Specifies a descriptive title for the bulletin board. The title can contain spaces and other punctuation marks. You should assign a meaningful title to the bulletin board. The default title is New. <b>This is a required field.</b>
Summary	(Optional) Specifies a brief description of the bulletin board. The contents of this field are displayed below the bulletin board title on the associated DocuShare collection page. You can use the Description field to provide a more detailed description of the bulletin board.
Description	(Optional) Specifies a detailed description of the bulletin board. The contents of this field are displayed below the bulletin board title and/or image on the DocuShare page. This field can contain HTML code to customize the bulletin board's appearance.
Expires	Specifies when bulletin board entries are automatically archived. The default is Never. Archived items are no longer displayed on the main bulletin board.

**Note:** There may be additional properties displayed on this page that are not listed here. They are specific to your DocuShare site. See your Site Administrator for details.

The bulletin board is created in DocuShare and the **Services** page for the bulletin board appears. You can verify that the bulletin board was created by clicking the **Appears In** link to move you up one level in the collection hierarchy. The bulletin board should now be listed with a  icon. If you don't see the bulletin board, click **Reload** on your browser to refresh the page display.

**Note:** After creating the bulletin board, you should adjust the **access permissions** for the bulletin board to make sure they provide the desired level of access for other users and groups. See the section [Viewing and Editing DocuShare Object Permission](#) in Chapter 3 for more information on adjusting these permissions.

## Viewing Bulletin Board Properties

You can view the properties of a bulletin board at any time. You do not need to be logged in to view a bulletin board's properties. However, you must be logged in to DocuShare to perform any editing functions that can be accessed through the Bulletin Board Services page.

To access a bulletin board's **Services** page, click on the **Services** icon to the right of the bulletin board in the collection listing. If you are in an open bulletin board, select **View Properties** from the **Edit...** pull-down menu.

Bulletin board properties include:

- All of the properties listed in the previous section.
- The bulletin board's identifying object number (handle), the owner who created the bulletin

board and the date and time of creation and last modification.

- The location of this bulletin board within the collection hierarchy of the DocuShare site (**Appears In** property). All DocuShare objects may appear in multiple locations.

All of these properties (except the object ID, the creation/modification dates/times, and bulletin board location) can be edited or modified by the owner of the bulletin board or a user with Writer access permissions through the **Edit Properties** function. Use the **Edit Location** function on main bulletin board **Edit...** pull-down menu to edit the **Appears In** property (bulletin board location).

The **Bulletin Board Services** page provides access to editing functions, using these selections in the pull-down menu:

- **Permissions** – View the access permissions for this bulletin board.  
If you are the owner or have Manager access permissions, you can also edit the access permissions from here.
- **Edit Location** – Change (move) or add locations for this bulletin board.  
You must be the owner of the bulletin board or have at least Writer access permissions to change bulletin board locations. See the section [Editing the Location of a Bulletin Board](#) in this chapter for more information.
- **Edit Properties** – Edit the properties for this bulletin board.  
You must be the owner of the bulletin board or have at least Writer access permissions to edit bulletin board properties.

## Editing Bulletin Board Properties

You can edit the properties of a bulletin board at any time by selecting **Edit Properties** from the **Edit...** pull-down menu. You must be the owner of the bulletin board or have Writer access permissions to edit a bulletin board's properties. You must also be logged in to DocuShare.

### To edit the properties of a Bulletin Board:

1. Click the **Services** icon for the bulletin board whose properties you want to edit. The **Bulletin Board Services** page appears.
2. Select **Edit Properties** from the **Edit** pull-down menu. The **Edit Bulletin Board** page appears.
3. Edit the bulletin board properties. Refer to the property descriptions from the table in the previous section for information.  
**Note:** If you are unsure of the purpose of a field while editing the bulletin board properties, you can click on the highlighted field name for a brief Help description of the field.
4. Click **Apply**. The **Bulletin Board Services** page for the bulletin board appears. The bulletin board properties are updated to reflect your edits.

**Note:** There may be additional, editable properties displayed on this page that are not listed here. They are specific to your DocuShare site. See your Site Administrator for details.

## ***Deleting a Bulletin Board***

Only the owner of a bulletin board (the user who added it to DocuShare) or a user with Manager access for that bulletin board can delete a bulletin board from DocuShare. You must be logged in to DocuShare to delete a bulletin board.

### **To delete a bulletin board:**

1. Open the bulletin board that you want to delete.
2. Select **Delete** from the **Edit** pull-down menu.
3. If there are no objects in the bulletin board, the **Confirm Deletion** page appears. Select the **Delete** button to delete the bulletin board.  
If the bulletin board contains other objects, the **Delete** page appears. This page lists the number of bulletin objects in the bulletin board that will be deleted. It also lists the number of objects that will not be deleted because of insufficient access rights, or because they appear in other locations.
  - To delete the bulletin board and its contents, select the **Delete Object and Contents** button.
  - To delete just the bulletin board, select the **Delete Just this Object** button.

**Note:** If you change your mind about deleting this bulletin board, use the **Back** button on your browser to close the Delete or Confirm Deletion page.
4. The **Delete Successful** page appears. Click the **Click here to continue** link.

The bulletin board is now deleted. You may need to **Reload** the page to see these changes.

## ***Restoring a Deleted Bulletin Board***

If you inadvertently delete a bulletin board from the DocuShare repository, the Site Administrator can easily restore it for you. All deleted content is sent to a trashcan accessible only to the Site Administrator. If you mistakenly delete a Bulletin Board, you must contact the Site Administrator and provide him/her with the necessary information. The Site Administrator is responsible for purging the trashcan on an as-needed basis. After purging, you will be unable to restore items deleted, so be sure to notify the Site Administrator of deletion restorations as soon as possible.

## ***Editing the Location of a Bulletin Board***

The **Edit Location** command allows a user to move a DocuShare object from one location to another or allows the object to appear in multiple locations within the DocuShare repository.

You must have at least Writer access to the object to change its location.

The location of an object is displayed in the **Appears In** property, which is displayed at the end of each **Properties** listing for an object. Using the Edit Location command allows you to edit the **Appears In** property.

This is a helpful command if you have created a Bulletin Board (or any other DocuShare object) in the wrong location and want to move it instead of deleting it and then re-creating it. It is also helpful if you would like the same object to appear in one or more additional locations. All DocuShare objects can appear in multiple locations at once. However, there is actually only one physical copy of the object in the DocuShare database; the system simply creates additional pointers or references to the object.

A negative side effect of this command is that if used incorrectly, you can orphan the object. Orphaned objects still exist within the DocuShare repository but are not accessible to users. Only a Site Administrator can recover orphaned objects.

#### **To change the location of a bulletin board:**

1. Click the **Services** icon for the bulletin board whose location you want to change. The **Bulletin Board Services** page appears.
2. Select **Edit Location** from the **Edit...** pull-down menu. The **Edit Bulletin Board Location** page appears.
3. For the **Appears In** field, a scrolling list is displayed that contains all DocuShare collections to which you have at least Writer access. The bulletin board's current location is highlighted.
  - To move an object, select the collection where you wish to move this object. The previous location will be deselected.
  - To have an object appear in multiple locations, press the CONTROL key while selecting the additional locations.  
**Note:** Use the CONTROL key for MS Windows-based Operating Systems only. Substitute the Command (or Apple key) key for the MacOS. UNIX-based systems require no special key for this multiple list item selection.

**Note:** Use caution when deselecting locations. Deselecting improperly can create orphaned files. Be sure that at least **one** location is selected in the scrolling list before selecting the **Update Locations** button.
4. Click the **Update Locations** button.

The Services page for that bulletin board now appears and the new location(s) is/are displayed in **Appears In**. If you don't see this change reflected on the Services page, click **Reload** on your browser to refresh the page display.

## **Adding a Bulletin**

You can add a **Bulletin** to any bulletin board in DocuShare to which you have Writer access permission. You must be logged in to create a Bulletin.

### To add a Bulletin:

1. Open the bulletin board where you want to add a bulletin. Select **Bulletin** from the **Add...** pull-down menu. The **Add Bulletin** page appears.
2. Specify the bulletin information. Refer to the table below for descriptions of each field.  
**Note:** While creating the Bulletin, if you are unsure of the purpose of a field, you can click on the highlighted field name for a brief Help description of the field.
3. Click the **Apply** button.

The **Add Bulletin** page has the following properties:

Property	Description
Title	Specifies a descriptive title for the bulletin. The title can contain spaces and other punctuation marks. You should assign a meaningful title to the bulletin. The default title is New. <b>This is a required field.</b>
Description	Contains your message or notice. This field can contain HTML code to customize the bulletin's appearance.

**Note:** There may be additional properties displayed on this page that are not listed here. They are specific to your DocuShare site. See your Site Administrator for details.

The bulletin is created in the DocuShare bulletin board and the **Services** page for the bulletin appears.

You can verify that the bulletin was created by clicking the **Appears In** link to move you to the default bulletin board view. If you don't see the collection, click **Reload** on your browser to refresh the page display.

**Note:** After creating the bulletin, you should view the **access permissions** for the bulletin to make sure they provide the desired level of access for other users and groups. See the section [Viewing and Editing DocuShare Object Permissions](#) in Chapter 3 for more information on adjusting these permissions.

## Editing Bulletin Properties

You can edit the properties of a bulletin at any time by selecting **Edit Properties** from the **Edit...** pull-down menu on the bulletin's Services page.

You must be the owner of the bulletin or have at least Writer access permissions to edit bulletin properties. You must also be logged in to DocuShare.

### To edit the properties of a bulletin:

1. Click the **Services** icon for the bulletin you want to edit. The **Bulletin Services** page appears.
2. Select **Edit Properties** from the **Edit...** pull-down menu. The **Edit Bulletin** page appears.
3. Edit the information. Refer to the property descriptions in the previous section for information.  
**Note:** If you are unsure of the purpose of a field while editing the bulletin, you can click on the highlighted field name for a brief Help description of the field.
4. Click the **Apply** button. The **Bulletin Services** page for the bulletin appears. The bulletin properties have now been updated to reflect your changes.

**Note:** There may be additional properties displayed on this page that are not listed here. They are specific to your DocuShare site. See your Site Administrator for details.

### ***Viewing and Deleting Expired Bulletins***

You can view and delete expired bulletins in a bulletin board. Only the owner of an expired bulletin or a user with Manager access to the bulletin can delete the bulletin. You must be logged in to DocuShare.

#### **To view and delete expired bulletins:**

1. Open the bulletin board.
2. Click **View Expired**. All expired bulletins for that bulletin board are displayed.
3. Select one or more bulletins and click **Delete Selected**. Click **Delete All** to delete the entire list of expired bulletins. The **Delete Successful** page appears.
4. Click the **Click here to continue** link.

The bulletin is now deleted. You may need to **Reload** the page to see these changes.

### ***Editing the Location of a Bulletin***

Just as in other DocuShare objects, the **Edit Location** command allows a user to move a DocuShare bulletin from one bulletin board to another or allows the bulletin to appear in multiple bulletin boards within the DocuShare repository. There is only one physical copy of the bulletin in the DocuShare database; the system simply creates additional pointers or references to it.

You must have at least Writer access to the object to change its location. You must also be logged in to DocuShare.

The location of an object is displayed in the **Appears In** property, which is displayed at the end of each **Properties** listing for an object. Using the Edit Location command allows you to edit the **Appears In** property.

Editing the location of a bulletin assists in creating group or shared bulletin boards. You can create a bulletin in your own bulletin board and then edit its location to appear in your bulletin board and your workgroup's bulletin board.

A negative side effect of this command is that if used incorrectly, you can orphan the bulletin. Orphaned objects still exist within the DocuShare repository but are not accessible to users. Only a Site Administrator can recover orphaned objects.

### To change the location of a bulletin:

1. Click the **Services** icon for the bulletin whose location you want to change. The **Bulletin Services** page appears.
2. Select **Edit Location** from the **Edit...** pull-down menu. The **Edit Bulletin Location** page appears.
3. For the **Appears In** field, a scrolling list is displayed that contains all DocuShare bulletin boards to which you have at least Writer access. The bulletin board's current location is highlighted.
  - To move a bulletin, select the bulletin board where you wish to move this bulletin. The previous location will be deselected.
  - To have a bulletin appear in multiple locations, press the CONTROL key while selecting the additional bulletin board(s).
 

**Note:** Use the CONTROL key for MS Windows-based Operating Systems only. Substitute the Command (or Apple key) key for the MacOS. UNIX-based systems require no special key for this multiple list item selection.

**Note:** Use caution when deselecting bulletin board. Deselecting improperly can create orphaned files. Be sure that at least **one** location is selected in the scrolling list before selecting the **Update Locations** button.

4. Click the **Update Locations** button.

The Services page for that bulletin now appears and the new location(s) is/are displayed in **Appears In**. If you don't see this change reflected on the Services page, click **Reload** on your browser to refresh the page display.

## 10 Searching in DocuShare

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### Overview

Every DocuShare object contains a set of associated attributes, which are sometimes also referred to as **meta-data**. These attributes include the object's title, summary, owner, description, creation date, and keywords. For most objects, such as collections and bulletin boards, this set of attributes is the object's complete information content. File objects, in addition, contain the user's original file in its original format. Whenever a new object is created, or an existing object is edited, it is indexed by DocuShare at that moment and made available for searching. For most office documents, like Word, Excel and WordPerfect, their content is indexed in addition to their meta-data attributes. Your site administrator can tell you which file formats are currently being indexed on your server.

For document content and every object's title, summary and description, the DocuShare search facility analyzes each word and indexes it in a way that enables you to find all variants of the word. This is known as *stemming*. For example, DocuShare's powerful stemming capability will locate the words "bath," "baths," and "bathes" when you request the word "bath." The other meta-data fields, including custom properties, are indexed for searching as well (with the exception of float type properties which are not indexed).

DocuShare allows you to submit queries from two locations.

- Simple keyword-style queries may be issued from the DocuShare home page by typing one

or more words into the form and clicking on the Search button. It will return all objects that have those words in any of their attributes, including file content.

- Powerful structured queries may be issued from the DocuShare Search page. It allows you to construct queries about specific attributes, for objects located within a given collection and created during a limited interval of time.

The results of your query are returned as a collection-style listing. One notable difference is that links to the collections in which each object appears are included. This enables navigation to the related context of a query in addition to the specific objects that satisfied the query.

## DocuShare Search Page

The DocuShare Search page allows you to build up sophisticated queries by selecting the desired constraints and attribute values from a set of form categories. The constraints imposed by the different categories are combined by multiple AND conjunctions to form the query. Within the **Where** category, you can use logical operators to build up queries about different object attributes. For example, the following is a valid query:

- **Document Type** is application/msword, and
- **Create Date** is after 1/1/97, and
- **Where** Title contains “market research” or Keywords contains “partners”

### Object Type

This pull-down list allows you to limit the search to a specific type of object, such as collections or files only. Selecting the special value **Any** allows you to search over all objects in the repository.

## Document Type

This field applies to File objects only, and lists all of the MIME Types currently supported by your server. It allows you to limit search to a single type of file, such as only Word or PDF documents. The Document Type constraint is combined with the Object Type constraint by an AND conjunction. If **Object Type** is set to Any, selecting a value for Document Type will automatically limit the search to objects of type File. If Object Type is set to an object type other than File, selecting a value for **Document Type** will lead to an empty result because non-files do not have a **Document Type** attribute.

## Create Date

Allows you to search for content that was first created before or after a specified date, or within a specified date interval. To search for content created before or after a specific date, enter the date into one of the **Create Date** fields, select the appropriate relationship (before, after, on, etc.) and leave the other field blank. To search for objects created within an interval of time, enter the interval start and end dates in the two **Create Date** fields and select the appropriate relationships.

## Modified Date

Allows you to search for content that was last modified before or after a specified date, or within a specified date interval. To search for content that was last modified before or after a specific date, enter the date into one of the **Modified Date** fields, select the appropriate relationship (before, after, on, etc.) and leave the other field blank. To search for objects that were last modified within an interval of time, enter the interval start and end dates in the two **Modified Date** fields and select the appropriate relationships. When using the **Modified Date** attribute, keep in mind that when an object is first created, its modified date equals its create date.

## Within

The **Within** category only appears on the form if you clicked on Search while viewing a collection or its properties. It is used to limit search to only that collection and all of the content it contains. A radio button is used to select between two possible values. By default, the location constraint is selected. Selecting the radio button value for “Site” removes the location constraint and searches over the entire repository.

## Where

The **Where** category allows you to use logical operators to build up queries about specific attributes, including file content. Selecting **Any Part** as the attribute value means that that part of the query will return true if the specified value appears in any of the object's attributes.

## Maximum Results

Specifies the maximum number of objects to return. Results are always sorted, with the highest match score first. Therefore, setting **Maximum Results** to 20 returns the 20 best

matches to your query.

## Logical Operators

The queries that DocuShare builds based on your input are given to the Verity search engine. Verity defines the four logical operators used in the **Where** category of the DocuShare Search page, as follows.

### AND

Searches for objects that contain all of the search elements you specify. The results are relevance-ranked. For example, the query:

Title contains marketing **And** Keywords contains technology  
only returns objects having both “marketing” in their title and “technology” in their keywords.

### OR

Searches for objects that contain at least one of the search elements you specify. The results are relevance-ranked. For example, the query:

Title contains marketing **Or** Keywords contains technology  
returns objects having either “marketing” in their title or “technology” in their keywords, or both.

### ACCRUE

Searches for objects that include at least one of the search elements you specify. The ACCRUE operator scores results in a cumulative fashion - the more search elements found, the better the score. For example, the query:

Title contains marketing **Accrue** Keywords contains technology  
returns objects having either “marketing” in their title or “technology” in their keywords. Object having both elements will be given a higher score.

### AND NOT

Searches for objects that do not include the search elements you specify. You can use AND NOT to exclude documents, often in an attempt to reduce known sources of noise in the search results. For example, the query:

Title contains marketing **And Not** Keywords contains technology  
returns objects that have “marketing” in their title but do not have “technology” in their keywords.

When you define a query using the logical operators, DocuShare groups the individual parts of the query using the following precedence rules:

- The **NOT** operator, as in **AND NOT**, always applies only to the next input string.
- The **AND** operator has the highest grouping priority below **NOT**.

- The **ACCRUE** operator has the highest grouping priority below **AND**.
- The **OR** operator has the lowest grouping priority.

For example, the query:

**Where** title *contains* test **OR** title *contains* practice **AND** summary *contains* homework

Is interpreted by DocuShare to mean:

(title *contains* test) **OR** ((title *contains* practice) **AND** (summary *contains* homework))

Objects containing “test” in their title will be returned, as will objects containing “practice” in their title and “homework” in their summary. Objects that contain “practice” in their title but do not contain “homework” in their summary will not be returned.

## ***Reserved Characters***

The Verity search engine uses some characters for internal functions or to denote wildcard patterns in your query.

### **Wildcard Characters**

<b>Character</b>	<b>Function</b>
?	Specifies one of any alphanumeric character, as in ?an, which locates “ran,” “pan,” “can,” and “ban.”
*	Specifies zero or more of any alphanumeric character, as in corp*, which locates “corporate,” “corporation,” “corporal,” and “corpulent.” Do not use an asterisk (*) to specify the first character of a wildcard string.

To use a wildcard character as a query string literal, precede it with a backslash (\). For example, to search for “x\*y” enter x\\*y.

### **Special Characters**

The following characters have special meaning to the Verity search engine and will not be treated as literals in a query string:


- comma ,
- left and right parentheses ()
- double quotation mark “
- backslash \
- at sign @

- left curly brace {
- left bracket [
- less than sign <
- backquote `
- equals =
- dash –
- caret ^
- pound #
- exclamation point !

These special characters are typically ignored and treated as a space in searching.

## Saved Queries

**Saved Queries** allow users to store into a collection the query used in a search and reuse it again at a later time. This is especially helpful when you have developed a complex query that will be reused multiple times, such as a description of an important subject area that you want to track.

By saving the query, you can access the desired information directly, without having to reenter the search information. New queries can also be defined and saved directly to a collection through the collection's **Add...** menu. Saved Queries are indicated by the  icon because they behave much like a collection, but their contents are the result of a search invoked each time the Saved Query is opened.

### To save a search query:

1. After performing a search, on the **Search Results** page click on the **Edit...** pull-down menu and select **Save Search Query**.
2. The **Save Search Query** page appears.
3. Fill in the desired information under the Title, Summary, Description, Keywords, and Appears In fields.
4. Click **Apply**.
5. The query is saved and the **Services** page appears.

### To add a new search query:

1. In the location where you want to add the query, select **Saved Query** from the **Add...** pull-down menu. The **Add Saved Query** page appears. The **Add Saved Query** page is

similar in layout to the **Search** page; however, the **Add Saved Query** page contains four additional fields:

Property	Description
Title	Specifies a descriptive title for the saved query. The title can contain spaces and other punctuation marks. <b>This is a required field.</b>
Summary	(Optional) This field should contain a short description of the type of saved query being submitted to the DocuShare repository. The contents of the Summary field will appear below the object's title on the page in which the object appears.
Description	(Optional) This field should contain a detailed description of the saved query.
Keywords	(Optional) This field should contain any Keywords associated with this query. Keywords help to categorize content and allow for more accurate searching if trying to locate this object. Simply type in a series of words in the field.

- The remainder of the fields contains the same parameters as the **Search** page. Fill in the rest of the information according to your search requirements.
- Click the **Apply** button. The **Saved Query Services** page appears.

### Viewing Saved Query Properties

To view the properties of a saved query, you must access the **Saved Query Services** page. You can do this by clicking on the **View Properties** option in the **Edit...** pull-down menu, or by clicking on the **Services** icon to the right of the link. Saved Query properties include:

- All of the properties listed in the previous section
- The saved query's identifying object number (handle), the owner of the saved query, the date and time of creation and last modification
- The subscription, query, and query's scope
- The location of this saved query within the collection hierarchy of the DocuShare site (i.e., the *Appears In* property). All DocuShare objects may appear in multiple locations.

## Editing Saved Query Properties

You can edit the properties of a Saved Query by selecting **Edit Properties** from the **Edit...** pull-down menu, or by clicking on the Services icon. The **Edit Properties** page contains the following properties:

Property	Description
Title	This field should contain the title of the object being submitted to the DocuShare repository. The title should be short but descriptive and may contain spaces and other punctuation marks. <b>This is a required field.</b>
Summary	(Optional) This field should contain a short description of the object being submitted to the DocuShare repository. The contents of this field will be displayed beneath the object's title when printing the contents of a Collection in which this object appears. The Description field may be used to provide a more detailed description of the object.
Description	(Optional) This field should contain a detailed description of the object. For Collections and other container-type objects, the contents of this field will be displayed at the top of the page, just below the title and/or image associated with the object. If desired, this field may contain HTML markup that will be inserted into the page without modification.
Keywords	This field should contain any Keywords associated with this object. Keywords help to categorize content and allow for more accurate searching if trying to locate this object. Simply type in a series of words in the field.

### To edit properties of a saved query:

1. In the **Edit...** pull-down menu, click on **Edit Properties**.  
**Note:** If you are not automatically taken to the Edit Properties page, click the **Go** button.
2. Edit the saved query properties. Refer to the property descriptions from the above table for information.  
**Note:** If you are unsure of the purpose of a field while editing subscription properties, you can click on the field name for a brief Help description of that field.
3. Click the **Apply** button. The **Saved Query Services** page appears, with the properties updated to reflect your changes.

## Editing the Location of a Saved Query

The **Edit Location** command allows a user to move a DocuShare object from one location to another, or allows the object to appear in multiple locations within the DocuShare repository. You must have at least Writer access to the object to change its location.

The location of an object is displayed in the **Appears In** property, which is displayed at the end of each **View Properties** listing for an object. Using the **Edit Location** command allows you to edit the **Appears In** property.

This is a helpful command if you have created a saved query (or any other DocuShare object) in the wrong location and want to move it instead of deleting it and then re-creating it. It is also helpful if you would like the same object to appear in one or more *additional* locations. All DocuShare objects can appear in multiple locations at once. However, there is actually only one physical copy of the object in the DocuShare database; the system simply creates additional pointers or references to the object.

A negative side effect of this command is that if used incorrectly, you can unintentionally *orphan* the object. Orphaned objects still exist within the DocuShare repository but are not accessible to users except by directly accessing their URL. A Site Administrator can help you recover orphaned objects if you do not know their URL.

### To change the location of a saved query:

1. Click the **Services** icon to the right of the saved query whose location you want to change. The **Saved Query Services** page appears.
2. In the **Edit...** pull-down menu, select **Edit Location**. The **Edit Saved Query Location** page appears.
3. In the **Appears In** field, a scrolling list is displayed that contains all DocuShare collections to which you have at least Writer access. The saved query's current location is highlighted.

- To move an object, select the collection where you wish to move this object. The previous location will be deselected.
- To have an object appear in multiple locations, press the CONTROL key while selecting the additional locations.

**Note:** Use the CONTROL key for MS Windows-based Operating Systems only. Substitute the Command (or Apple key) key for the MacOS. Unix-based systems require no special key for this multiple list item selection.

**Note:** Use caution when deselecting locations. Deselecting improperly can create orphaned files. Be sure that at least **one** location is selected in the scrolling list before selecting the **Update Locations** button.

4. Click the **Update Locations** button.

The **Saved Query Properties** page for that query appears and the new location(s) is/are displayed in *Appears In* property. If you don't see this change reflected on the **View Properties** page, click **Reload** on your browser to refresh the page display.

### ***Editing the Query***

You may change the search parameters of a query at any time. Changing the search parameters is useful if you decide that, for example, you want to search for additional document or object types using the same saved query.

#### **To edit the query:**

1. In the **Edit...** pull-down menu, select **Edit Query**.  
**Note:** If you are not automatically taken to the Edit Query page, click the **Go** button.
2. Edit the query search parameters.
3. Click the **Apply** button. The **Saved Query Services** page appears, with your changes reflected.

### ***Deleting a Saved Query***

#### **To delete a saved query:**

1. Click on the **Services** icon to the right of the saved query you want to delete.
2. Select **Delete** from the **Edit** pull-down menu.
3. The **Confirm Deletion** page appears. Click on the Delete button to delete the saved query.

**Note:** If you decide that you do not want to delete the saved query, click the **Back** button on your browser to close the Delete or Confirm Deletion page.

4. The **Delete Successful** page appears. Click the **Click here to continue** link.

### ***Restoring a Deleted Saved Query***

If you inadvertently delete a saved query from the DocuShare repository, the Site Administrator can easily restore it for you. All deleted content is sent to a trashcan accessible only to the Site Administrator. If you mistakenly delete an object, you must contact the Site Administrator and provide him/her with the required information. The Site Administrator is responsible for purging the trashcan on an as-needed basis. After purging, you will be unable to restore items deleted, so be sure to notify the Site Administrator of deletion restorations as soon as possible.

## 11 **Using the DocuShare Windows Client**

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[Mounting a DocuShare Server on Windows Explorer](#)

[Accessing a Mounted DocuShare Server via Windows Explorer](#)

[Viewing and Editing Files with the DocuShare Windows Client](#)

[New Function Buttons in the Windows Client](#)

[New Menus in the Windows Client](#)

[Working with DocuShare Files in the Windows Client](#)

- [Adding, Copying, and Deleting Files or Folders](#)
- [Versioning and Locking Files](#)
- [Editing File Properties](#)

[Searching DocuShare with the Windows Client](#)

[Configuring Options](#)

[View the Work-In-Progress Folder](#)

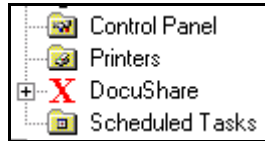
[Open/Save/Save As... Dialogs](#)

### **Overview**

The Windows Client allows you to work with a DocuShare repository of files (or several) from within Windows Explorer. Once you mount the server and log in, DocuShare will appear as a separate drive in the familiar Windows Explorer tree environment. When you click on the DocuShare drive from Windows Explorer, DocuShare collections appear as folders, and files appear as the appropriate icons. You can bypass normal upload procedures and copy files to a DocuShare collection from your local or network drives, or you can drag and drop files from DocuShare directly to your computer, avoiding the download step. Simply select the file (or files) you want and drag it to the folder to which you wish to upload or download. It works the same as when you drag files around within your computer or to and from network drives.

## Mounting a DocuShare Server on Windows Explorer

The DocuShare Windows Client must be installed on your computer before you can mount a DocuShare server on Windows Explorer. See [Installing the Windows Client](#), Chapter 1. Once you have installed the Windows Client, click the DocuShare icon as it appears in Windows Explorer.



All DocuShare servers that have been mapped to the Windows Client will be displayed. Initially, no servers are mapped.

### To map a DocuShare server:

1. Either select the **Add Server** icon or choose **Map DocuShare Server** from the Explorer **Tools** Menu. The Step 1 dialog box of the Map Server Wizard will appear.
2. Under Home **URL**, type in the name of your DocuShare server (e.g., <http://sales.acme.com>). If you prefer, you can use the **Browse...** button to launch a web browser for you to select the DocuShare server with. The DocuShare Windows Client supports connections to servers via standard HTTP or SSL so either <http://> or <https://> should be used as the URL prefix.
3. If a proxy server is needed, press the **Advanced** button. If the DocuShare server you are using is local, do not use a proxy server.
4. Press **Next**. The Step 2 dialog box appears.
5. Enter your username under **Account Name**.
6. Enter your password under **Password**. (If mapping as a **Guest**, leave the **Password** field empty.)
7. If you do not have an account on the DocuShare server, check the “Create a new account” checkbox and enter the confirmation password, email address, and user name. A new account will be created for you on the server with this user ID and password.
8. Press **Next**. The Step 3 dialog box appears.
9. Enter the name you want to appear in the Windows Client under **Folder Name in Explorer**. Although this name can be different than the name of your DocuShare website, you probably want to give it the same name or a related, meaningful name to avoid any confusion with other servers.
10. Enter a name under **Work-in-progress directory name** that is at least four characters long.

11. Press **Next**. The Step 4 dialog box lets you review the information you entered in steps 1 through 3. If the information is correct, press **Finish** to create the server folder. If you experience a login problem, see Chapter, [14, Troubleshooting](#).

At this point, the new folder for the server will appear in Windows Explorer under the DocuShare icon. In addition to mapping servers, specific collections within servers can be mapped into the DocuShare Windows Client root directory. A mapped collection allows the collection to be accessed directly without having to walk down the server's tree hierarchy. These mapped collections must exist on a mapped server.

#### **To map a DocuShare collection:**

1. Make sure the server that the collection resides on is already mapped.
2. Select the **Add Collection** icon. The Map Collection dialog is displayed.
3. Select the server on which the collection resides.
4. Walk through the collection hierarchy and select the collection. Click **OK**.

The new folder for the mapped Collection will now appear under the DocuShare icon.

#### **To remove a DocuShare server from the DocuShare Windows Client:**

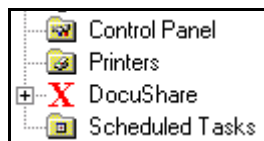
1. Select **Disconnect DocuShare Server** from the Windows Explorer **Tools** Menu.
2. Select the DocuShare server you wish to disconnect.
3. Click **OK**.

The server you selected for removal should no longer appear on the Windows Explorer interface. If the server does still appear, select **Refresh** in the Windows Explorer **View** menu.

### ***Accessing a Mounted DocuShare Server via Windows Explorer***

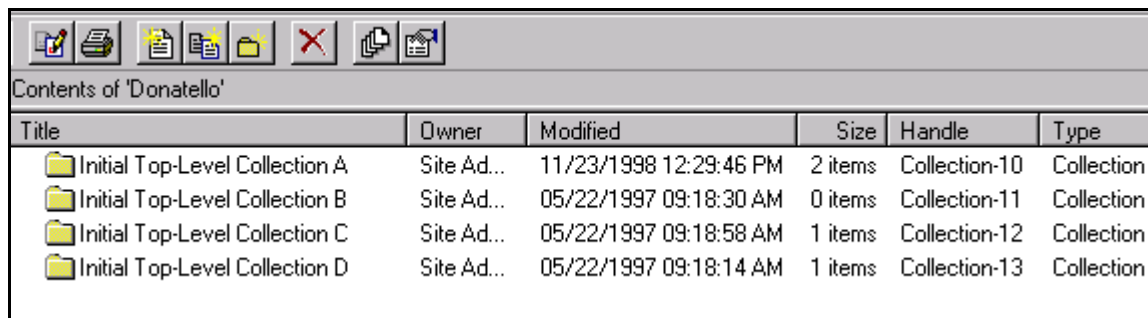
#### **To access a mounted DocuShare server via Windows Explorer:**

1. Double-click on the DocuShare icon that appears in your Windows Explorer tree structure. See example below:




2. Type your password in the dialog box, which may appear, then click **OK**. Remember that your password is case-sensitive. If you make a mistake and see an error message, try entering your password again or see your Site Administrator.

3. The DocuShare server then opens onto your Windows Explorer Interface, and you will see the familiar folder pattern of collections and objects that make up the DocuShare site.



You can now point and click to open DocuShare collections on your DocuShare site as if they were folders on one of your local or network drives.

### Viewing and Editing Files with the DocuShare Windows Client

Viewing and editing DocuShare files on the Windows Client is similar to viewing and editing files on one of your local drives in Windows Explorer. Collections appear as Windows Explorer folders that may contain files, URLs, calendars, bulletin boards or other collections/folders. Files will appear with their corresponding icons (e.g.,  for Microsoft Word files).

To open a DocuShare collection/folder in the Windows Client, simply double-click the folder with your mouse. The contents of that collection/folder will then appear in the right-hand side of the Windows Explorer Interface. Remember that permissions still apply, so depending on your access, you may not be able to view restricted collections or folders. See Chapter 3, [DocuShare Permissions](#) for further information.

To open a DocuShare file, simply double-click on the file name. There are two ways to “open” a DocuShare file. The default response to double-clicking on the file is to open the corresponding application with the file set to *read only*. This is called **browse** mode. Alternatively, you may open the file for editing and save it back to DocuShare when you are done. This is called **check out**. When you check out a file, the original copy on the DocuShare server is locked while you edit the file so that others will not be able to create new versions while you are editing the current version. Both options are available from the menu that appears when you click your right mouse button on the file name. Which action is your default in response to a double-click is configurable from the DocuShare settings screen (see Configuring Options).

The DocuShare Windows Client supports the following applications for check out:

- Microsoft Word, Excel and PowerPoint, 95, 97, and 2000 editions.
- Lotus WordPro 32
- Lotus Freelance

- Corel Presentations
- Corel Quattro Pro 8.0
- Corel WordPerfect 7.0, 8.0, and 9.0
- Visio 5.0
- Microsoft Notepad, Wordpad and Paint

Other applications may or may not correctly check out of DocuShare or save back to DocuShare. See Chapter 14, [Troubleshooting DocuShare](#).

You may also independently lock or unlock a file. When a file is checked out, it is automatically locked. You may not unlock a checked out file. A locked file can only be browsed, and cannot be checked out.

Saving the file in the corresponding editor will save the file locally. When you exit the corresponding editor, the DocuShare Windows Client will automatically upload the saved local file to the DocuShare server and unlock the file.

### ***New Function Buttons in the Windows Client***

Most of the function buttons on the Windows Client are the same as the function buttons in Windows Explorer; however, there are a few differences. The table below gives a description of the function buttons in the Windows Client.



Up one Level: Takes you one level higher in the tree structure. It works the same for DocuShare as it does for Windows Explorer.



Large Icons: Displays large icons. It works the same for DocuShare as it does for Windows Explorer.



Small Icons: Displays small icons. It works the same for DocuShare as it does for Windows Explorer.



List: Displays icons in a list. It works the same for DocuShare as it does for Windows Explorer.



Details: Displays icons in a list with details about the files. It works the same for DocuShare as it does for Windows Explorer.



Thumbnail: Displays large icons of document files and thumbnail images of graphics files.

**Note:** Thumbnails are only available when connected to a DocuShare server running version 2.1 or higher.



**Edit:** Opens an edit program for the file. The specific response depends upon the edit program. For supported applications, DocuShare will open the application for editing and offer to save the editing file back to the same DocuShare location when you close the window. For unsupported applications, DocuShare will open the file in read-only mode. See the Editor Support section for more details. It works the same for DocuShare as it does for Windows Explorer, but you will be offered the ODMA option (see [ODMA Client](#)).



**Print:** Prints the current file. It works the same for DocuShare as it does for Windows Explorer.



**Add Document:** Adds a document to the current collection/folder. This function button is unique to the DocuShare Windows Client.



**Create New Version:** Creates a new version of the file with which you are working. This function button is unique to the DocuShare Windows Client.



**Create New Collection:** Creates a new collection within the open collection. This function button is unique to the DocuShare Windows Client.



**Delete:** Deletes the selected file. It works the same for DocuShare as it does for Windows Explorer, except that you must have Manager access to delete a file.



**View Version History:** Shows you the version history of the current document. This function button is unique to the DocuShare Windows Client.



**View Properties:** Displays the properties of the selected file. It works essentially the same for DocuShare as it does for Windows Explorer.



**Undo:** Undoes the last action. This Windows Explorer function is **not** supported in the DocuShare Windows Client.



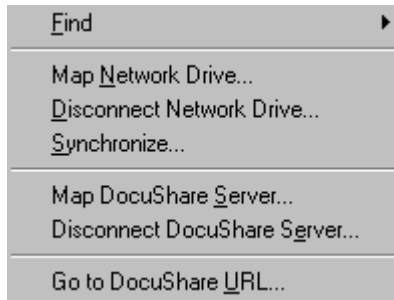
**Map Server.** Brings up the sequence of screens to map to another DocuShare server. This button only appears when the Xerox DocuShare drive is selected.



**Disconnect Server.** Allows you to remove one of the currently mapped DocuShare servers. This button only appears when the Xerox DocuShare drive is selected.

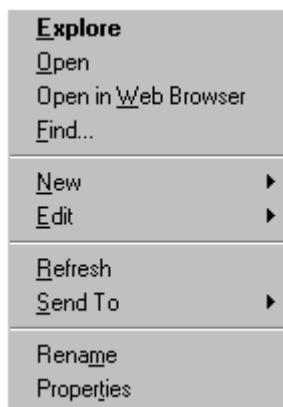
## New Menus in the Windows Client

In addition to the Windows Explorer function buttons, you will notice various pop-up menus when you right-click your mouse within the Windows Client. As with the function buttons, these menus closely resemble the standard Windows Explorer right-click menus with a few differences.



Whenever DocuShare content is selected, the Windows Explorer **Tools** menu contains an additional section for three DocuShare-specific commands. **Map DocuShare Server...** allows you to connect to additional DocuShare sites. **Disconnect DocuShare Server...** allows you to remove currently mapped DocuShare sites. This is also useful if you want to login as a different user. **Go to DocuShare URL...** brings up a window in which you can enter a DocuShare location directly. The window offers a partial URL as a hint that you must complete.

On Windows 2000, the **Find Files in DocuShare...** item is also available under this **Tools** menu.



This menu appears if you right-click your mouse in the All Folders section (i.e., left side) of the Windows Client. Functions are an abbreviated list of those found in Windows Explorer.

**Open in Web Browser** launches an Internet Explorer window to the selected server.

**New** allows you to create a new folder (i.e., collection) or a new document. You can also create new Calendar, Bulletin Board, and URL objects.

**Edit** allows you to copy the DocuShare URL or DocuShare Properties URL for the folder onto the clipboard, along with the standard edit operations of Cut, Copy, Paste, and Delete.



This menu appears if you right-click your mouse in the Folder Contents section (i.e., right side) of the Windows Client. Functions are mostly the same as in Windows Explorer. The DocuShare functions are listed below.

**Open in Web Browser** launches an Internet Explorer window to the selected collection.

**New** allows you to create a new folder (i.e., collection) or a new document. You can also create new Calendar, Bulletin Board, and URL objects.

**Edit** allows you to copy the DocuShare URL or DocuShare Properties URL for the folder onto the clipboard, along with the standard edit operations of Cut, Copy, Paste, and Delete.

**View** lets you choose among the following: large icons, small icons, list, details, or thumbnail image view.



This menu appears if you right-click your mouse on a file in the Folder Contents section (i.e., right side) of the Windows Client. Functions are a mix of Windows Explorer and DocuShare. The DocuShare functions are listed below.

**Browse** opens the selected file.

**Check Out** opens the selected file and locks it so others cannot use or change this file while you have it active.

**Print** opens the selected file and issues a Print request to the editor.

**Open in Web Browser** launches an Internet Explorer window to view the selected item.

**Lock** locks the file.

**Unlock** unlocks the file.

**Version History** lets you view the version history of the file.

**New** creates a new version of the file using the existing file.

**Edit** allows you to copy the DocuShare URL or DocuShare Properties URL for the object onto the clipboard, along with the standard edit operations of Cut, Copy, Paste, and Delete.

**View** lets you choose among the following: large icons, small icons, list, details, or thumbnail image view.

**Rename** lets you rename the file. This will change the file's Title

property on the DocuShare server.

**Properties** displays a window for viewing and editing the object's properties.

## ***Working with DocuShare Files in the Windows Client***

Working with DocuShare files on the Windows Client is much the same as working with regular files from your local or network drives on Windows Explorer. Using standard Windows Explorer drag and drop operations, you can copy files to a DocuShare collection from your local or network drives, or you can copy files from DocuShare directly to your computer. You can also copy and move DocuShare files from folder to folder within the DocuShare using drag-and-drop operations. Other standard Windows Explorer features are available as well, such as Rename, Delete, and Properties.

### **Adding, Copying, and Deleting Files or Folders**

To add (i.e., upload) files from a local or network drive to a DocuShare folder (i.e., collection) on the Windows Client, follow the steps below.

#### **To add files or folders:**

1. Select the file(s) you wish to add with your mouse and drag it to the desired DocuShare folder.

**Note:** Remember that you must be logged in and have **Writer** permission to add files to a DocuShare collection.

2. A confirmation message box will appear. Click **Yes**.

The file will now appear in the DocuShare folder you designated. If you do not see the copied file, right-click your mouse in the contents area (i.e., right side of Explorer Screen) and select **Refresh**.

**Note:** You can also add files to DocuShare via the ODMA Client. See Chapter 12, [The DocuShare ODMA Client](#) for further information.

The above process works the same for adding folders from a local or network drive to a DocuShare folder on the Windows Client. All contents of the added folder will be included.

#### **To copy files from a DocuShare folder to a folder on your local or network drives:**

1. Select the file(s) you wish to copy with your mouse and drag it to the desired local or network folder.

**Note:** The **Confirm Item Copy** screen does not pop up for this type of action (i.e., a download).

2. Use the same select and drag procedure as above to copy files from one DocuShare folder (i.e., collection) to another.

The **Confirm Item Copy** screen will pop up if you copy files from one DocuShare server to another, but otherwise the process is the same. Remember that you must have **Write** permission to add files to a DocuShare collection even if the files are coming from another DocuShare collection or server.

The above process works the same for copying folders from a DocuShare folder on the Windows Client to a local or network drive. All contents of the added folder will be included.

**Note:** Dragging files from DocuShare to the Windows Recycle Bin will not delete the file from DocuShare. Files should only be dragged from DocuShare and dropped into regular file locations.

#### **To delete files from DocuShare on the Windows Client:**

1. Select the file(s) with your mouse and press the Delete function button on the Windows Client Interface or the Delete button on your keyboard.

**Note:** Remember, you must have **Manager** access to delete files or folders from DocuShare.

2. A confirmation screen will appear. Click **Yes** if you are certain you want to delete the file or folder.

The file or folder is now deleted. You may need to select **Refresh** from the right-mouse menu to reload the page and see the deletion.

#### **Versioning and Locking Files**

Versioning and Locking Files basically works the same way as it does in the web version (see Chapter 5, [DocuShare Files](#) for in-depth information). Follow the process below to create a new version of a file on the DocuShare Windows Client.

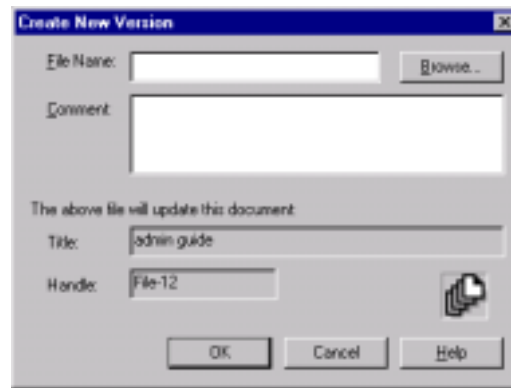
#### **To create a new version of a file:**

1. Click on the **Create New Version** function button at the top of the interface or choose **New → Version** from the mouse right-click menu. The file must be selected for you to use the right-click menu.

You can also drag and drop a local file onto a file in DocuShare to create a new version.

**Note:** You can not drop a DocuShare file onto another DocuShare file to create a new version.

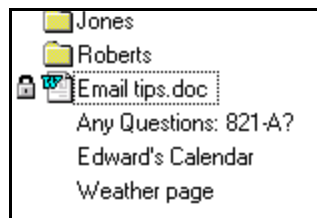
2. The **Create New Document Version** dialog box appears:



3. Enter the file name or select it by using the **Browse** key.

To view the **Version History** of a document on the DocuShare Windows Client, select the file by right-clicking it and choose **Version History** from the menu. You can also view the version history by clicking the **View Version History** function button at the top of the Windows Client interface. Within the Version History Dialog, you can right-click a version and choose version-specific actions from the menu such as **Browse**, **Copy**, and **Copy URL**.

To lock a file on the DocuShare Windows Client, select the file by right-clicking it and choose **Lock** from the menu that appears. A padlock icon will appear to the right of the document icon.



You can also check out a document by selecting the document by right-clicking and choosing **Checkout** from the menu. This automatically opens the file and locks it so you can work on it. See Chapter 12, [The DocuShare ODMA Client](#) for further information.

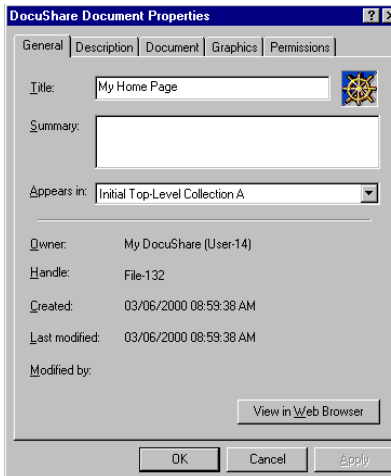
To unlock a file on the DocuShare Windows Client, select the file by right-clicking it and choose **Unlock** from the menu that appears. The padlock icon will disappear.

### **Editing File Properties**

You can view and edit the properties of a file with the Properties Dialog.

#### **To display the Properties Dialog:**

1. Click on the **Properties** function button at the top of the interface or choose **Properties** from the mouse right-click menu.
2. The **Properties** dialog box appears:

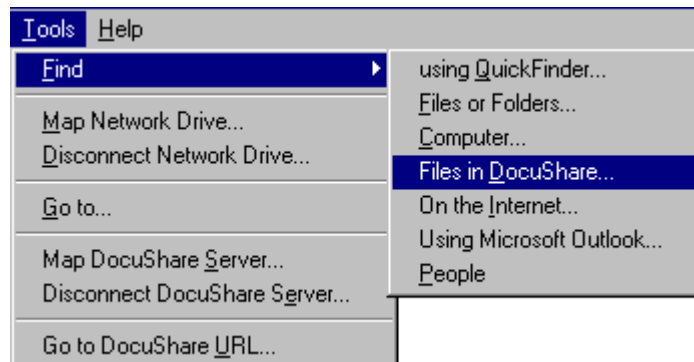


3. Inspect other tabs as required.

## Searching DocuShare with the Windows Client

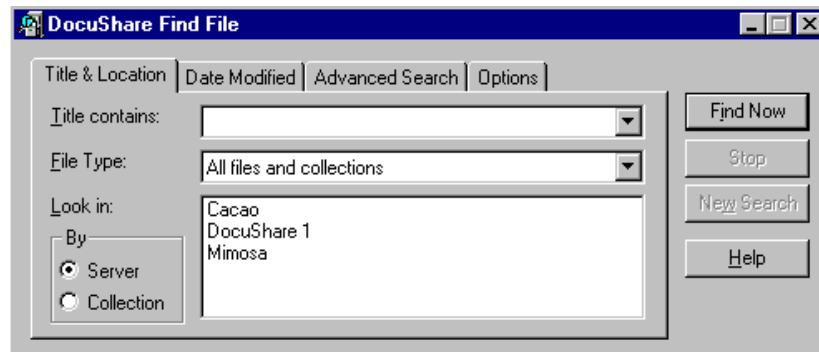
To search DocuShare with the DocuShare Windows Client:

1. Select **Find** → **Files on DocuShare** from the Explorer Tools Menu.

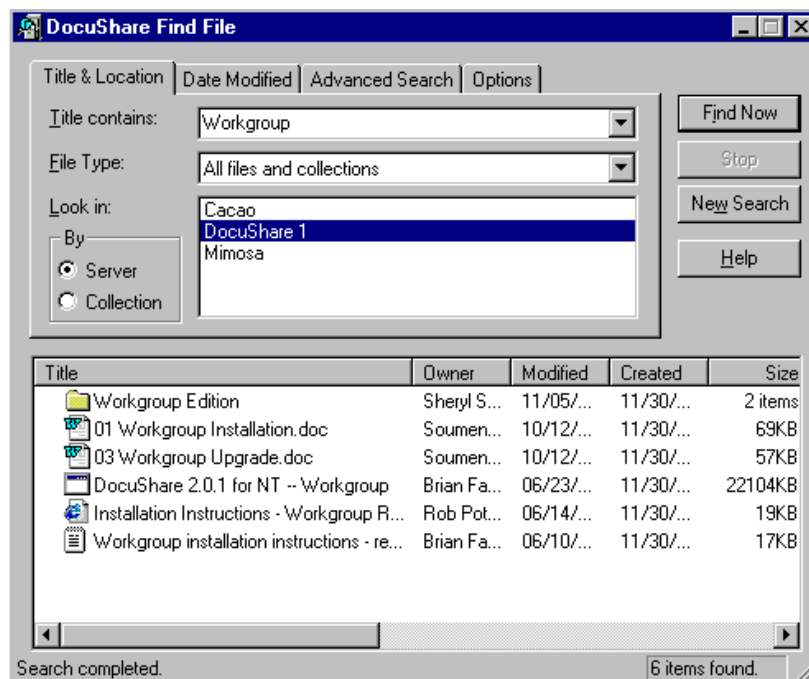


On Windows 2000, the **Find Files in DocuShare** item is available directly under the **Tools** menu. DocuShare Find is not integrated with the Windows 2000 Search interface in DocuShare 2.2.

2. The **DocuShare Find File** dialog box appears.





3. Fill in your search criteria as necessary. The search can be issued across multiple servers, or restricted to just a certain collection on a server.
4. There are four tabs of criteria at your disposal: **Title & Location**, **Date Modified**, **Advanced Search**, and **Options**. These four tabs together mirror the search criteria options from the web view.
5. Click **Find Now** when you are ready to start the search.
6. The Search Results appear underneath the **Find File** box.

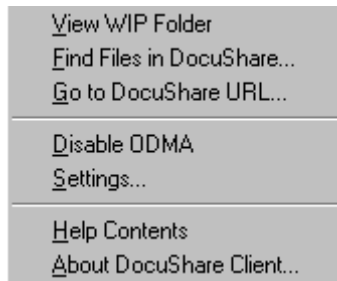


7. To copy found files to your PC, you can use the regular drag and drop method. To check the properties of an item, right-click on an item and select **Properties** from the menu. If you edit the properties of an item in the search results, you'll note that an exclamation icon is displayed in the search results next to the item to denote it has been modified.

To exit the search dialog box, click on the X in the upper-right hand corner.

## Configuring Options

There are several options on the DocuShare Windows Client that you can configure. To access the options, double-click the **DocuShare Client Properties** icon in the **Windows Control Panel**. Alternatively, you can right-click on the red Xerox  icon in the toolbar of your Windows Explorer interface. (On most machines, the  will be located at the bottom-right corner – the Start button is usually in the bottom left corner.) When you right-click on the icon, a short menu appears:

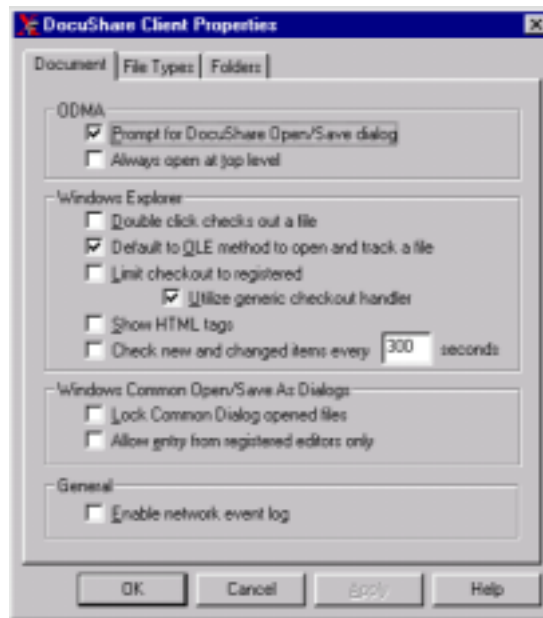


Choose **Settings...**

**Note:** Checking “Disable ODMA” from this menu will turn off the ODMA option. “View WIP Folder” will show you information about the Work in Progress. “About DSClient” gives you license and version information on the DocuShare Windows Client.

After you select **Settings**, the **DocuShare Client Properties** dialog box appears.

**Note:** The options shown as selected in the following examples are the DocuShare Windows Client default options. Your Site Administrator can help you figure out the best settings for your machine and requirements. The DocuShare Properties dialog offers various options regarding the DocuShare Windows Client’s behavior.



## **ODMA Settings**

- When “Prompt for DocuShare Open/Save dialog” is checked, each time you open or save a document, a DocuShare screen will appear asking if you want to open from or save to a DocuShare server or your local drives. When not checked, Open and Save operations will always assume that you want a DocuShare server. See the chapter on DocuShare ODMA Client.
- The “Always open at top level” option tells the DocuShare Windows Client where to start when it opens a DocuShare collection listing for Open and Save operations.

## **Windows Explorer**

- DocuShare files may be opened for read-only viewing (Browse) or for editing (Checkout). The “Double-click checks out a file” setting indicates which action you prefer as the default when you double-click on a file. Both actions are available by clicking on the right mouse button over the desired file.
- If the “Default to OLE method to open and track a file” option is not enabled, the Windows Client runs an explicit check on the OLE (Object Linking and Embedding) registration for the editor application that is associated with a checked out file. It will then determine if the editor application is capable of being started using an OLE-based launch method.

This option is available only for NT4 and Windows 2000 users. The option is grayed in Windows 95 and 98. The OLE registry check is always made under Windows 95 and 98.

Normally, this option should be left enabled under NT because NT provides OLE packager support for non-OLE applications that the Windows Client can use to open the file correctly. However, if the editor program you use does not support the OLE launch method, and does not work with NT's OLE packager, you should uncheck this option.

Note that the default OLE launch method can be overridden by selecting a different launch method using the File Type tab (see below). In addition, the default OLE method is overridden if the file type supports ODMA.

- The “Limit checkout to registered” option prevents the DocuShare Windows Client from attempting to launch editor sessions for applications which have not explicitly been certified for use with the Client. (A registered file type appears in the list under the **File Types** tab when the “Common types only” option is enabled.)

**Note:** If the appropriate editor for a file type is not installed on the local PC, attempting to open the file will cause an error message saying that the proper editor registered with the Windows system could not be found.

If disabled, the Windows Client will always attempt to launch an editor session. However, because non-certified editors may not function properly with the DocuShare Windows Client, this option should only be disabled with caution.

- If “Limit checkout to registered” is enabled, non-registered file types can be checked out

if the “Utilize generic checkout handler” option is selected. This setting instructs the Windows Client to use a generic checkout handler to check out a file that is not explicitly registered with the Client. This technique allows non-certified editors to be used while minimizing the risk of failure.

This handler uses a simple process-monitoring method to track the life cycle of the editor application. Since the Windows Client does not explicitly support the editor, you have to tell the Windows Client when you are ready to check the file back into DocuShare. The handler runs a small window with OK and Cancel buttons at the top-left corner of the desktop. Click the **OK** button to initiate a check-in after you have finished editing the file and closed the editor application. Click the **Cancel** button to discard any changes you have made.

- The “Show HTML tags” option instructs the Windows Client to display all HTML tags used in the titles of DocuShare objects. By default, all HTML tags are removed for display in the Windows Client.

The typical use of HTML in DocuShare properties is for formatting in the browser interface. For example, a file title may contain <FONT> tags for rendering a part of the title text in a typeface different from the default system font. With this option enabled, the Windows Client will keep the <FONT> tags in the title text it displays in the Windows Explorer, ODMA and any other Client components. Note that the raw HTML tags will be displayed – the Windows Client makes no attempt to parse this HTML like a browser.

Usually, this option should be left disabled so that the Client does not show HTML tags. However, if you edit the properties of an object that originally had HTML formatting in its title, you’ll lose that HTML formatting when you apply the properties change. Also note that toggling this option requires a system reboot for the change to take effect.

- The “Check new and changed items every X seconds” option toggles the setting of auto-refresh for collection listings. When this option is disabled, the Windows Client does not perform any periodic auto-refresh. To refresh the listing, you need to select the **Refresh** menu item in the Windows Explorer.

When this option is enabled, the Windows Client periodically performs a query in the background and updates the listing for changed collections automatically. The auto-refresh feature should not be enabled if you experience slow or heavy network traffic or if it interferes with document checkout or other DocuShare Client activity.

More advanced settings are available in Windows Explorer's Folder Options dialog, which allow you to configure the way that Windows Client updates and caches the collection listing data. Open the DocuShare folder in Windows Explorer, select the Folder Options menu item from the View menu, and select the DocuShare tab.

### **Windows Common “Open/Save As” Dialogs**

- When the “Lock Common Dialog opened files” option is enabled, the Windows Client locks files opened through the Common Dialog. If you do not want the Windows Client to lock a particular file, you can uncheck the “Lock” option in the DocuShare

Informational box that appears next to the Common Dialog.

- Checking “Allow entry from registered editors only” prevents access to DocuShare from editors that have not explicitly been certified for use with the Windows Client when the editor's native Open/Save-As dialog is used. Refer to the README.TXT included in the DocuShare Windows Client installation directory for the latest list of supported editors. If the option is not checked, the Windows Client allows any editor to access DocuShare. However, some editors may not be able to actually open the DocuShare folder. For example, Microsoft Word raises an access/denied error if you try to open the DocuShare folder through its native Open dialog.

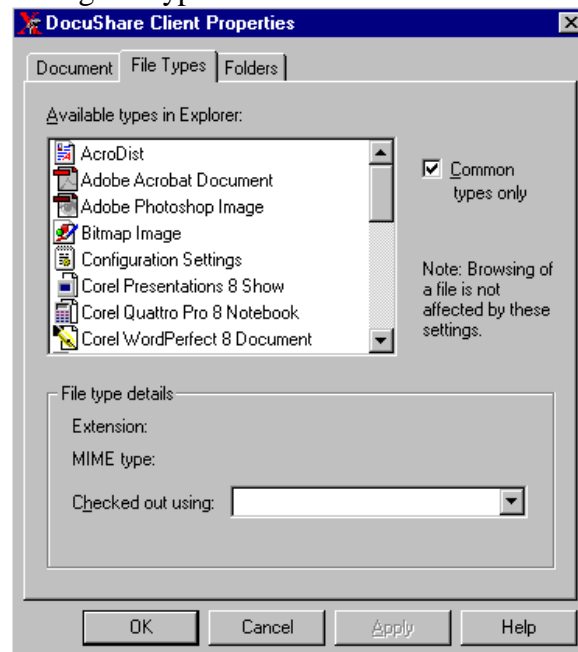
## **General**

The “Enable network event logs” field allows you to tell the DocuShare Windows Client to log all error events. For any network errors, the Windows Client displays an exception report dialog and shows the logged information under the “Event Log” tab.

## **FileTypes Tab**

The File Types tab allows the Windows Client use of editor applications to be modified. Because many different editors behave in different ways, the DocuShare Windows Client allows fine-tuning of this editor connection. .

Note that changes to these settings do not affect how the Windows Client opens files for browsing. The Windows Client delegates the task of launching an associated editor application for file browsing to Windows itself. Therefore, to modify the browser behavior, the Windows file type settings must be modified through the Windows Explorer. Refer to a Windows user guide for more details on editing file type associations in Windows.



- “Available types in Explorer” is the list of file types that can be modified. If the “Common types only” option is checked, the list only shows file types that are associated with certified editor applications. Uncheck this option to list all available types registered with Windows.
- “File type details” consists of two file type specifiers (Extension and MIME type) and the checkout method that will be used to open files of this type.
- The file extension name under Extension is used by Windows and most editor applications. The MIME type setting is used by DocuShare and other Internet applications.
- Under the checkout method, either the common name of the associated editor application or a command line to run the application may appear.

You cannot edit the file type. The Windows file type (extension) is set when you first check in a file. The file extension name is the last part of the filename you specified. The MIME type is automatically assigned by DocuShare when the file is indexed. You can edit the MIME type using the DocuShare Client. To do this, open the Properties dialog for the file and either enter a new MIME type specifier, or select from the drop-down list.

If the file you check out does not contain a file extension, the DocuShare Windows Client uses the MIME type setting to generate one. The Windows Client always uses the file extension to determine which editor application to use.

Depending on the editor application, the Windows Client needs to use a different checkout method. The selected method is shown under “Checked out using”. The program file or command line that is used to run the editor program is shown below the selected method.

The DocuShare Windows Client uses the following checkout methods (also mentioned as editor launch methods elsewhere in this document):

- ODMA protocol
- Custom handler
- OLE protocol
- DDE protocol
- Process monitoring
- None (file is uneditable)

These methods are listed according to the level of editor integration. You should select the method for the highest level of which your editor application is capable. If the selected method does not work for your editor program, change it to a lower method. If the file type does not designate an editable document or media data file, you should select the None method to disallow checkout.

Make sure that the file extension and MIME type settings are correct. Since the Windows Client first looks at the file extension, if the file extension is not correct, the Windows Client may not run the correct editor program even if a correct MIME type is given. To work around this problem, download the file, give it the correct file extension name, and upload it as a new version of the same file (using the New Version menu item or the drag and drop method). These supported editor launch methods are described in more detail below.

The ODMA protocol allows the editor to gain direct control over the DocuShare file access. A file opened using this protocol may be safely saved as a new document (using the File | Save As menu item). The Windows Client can use the ODMA protocol if the file type is one of the following:

- MS Word 97 and 2000 document (extension .doc)
- MS PowerPoint 97 and 2000 document (extension .ppt)
- MS Office Binder 97 and 2000 document (extension .bnd)
- Corel WordPerfect versions 8 and 2000 (extension .wpd)
- Lotus Wordpro versions 8 and 2000 (extension .lwp)

An editor application may support ODMA in general, but if it does not support the ODMA command line syntax, the ODMA protocol will not be used to check out a file directly from Windows Explorer. Visio is one such editor application. In the case of Visio, the Windows Client pre-selects the OLE protocol.

A “custom handler” is a special Windows Client program that was written specifically for handling the tasks of opening a file of a particular file type and tracking its life cycle in a particular editor application. The following are supplied by the Windows Client:

- MS Excel 97 and 2000 worksheet (extension .xls)
- Corel WordPerfect versions 7, 8 and 2000 (extension .wpd)
- Corel Presentations versions 8 and 2000 (extension .shw)
- Lotus Freelance versions 7 and 2000

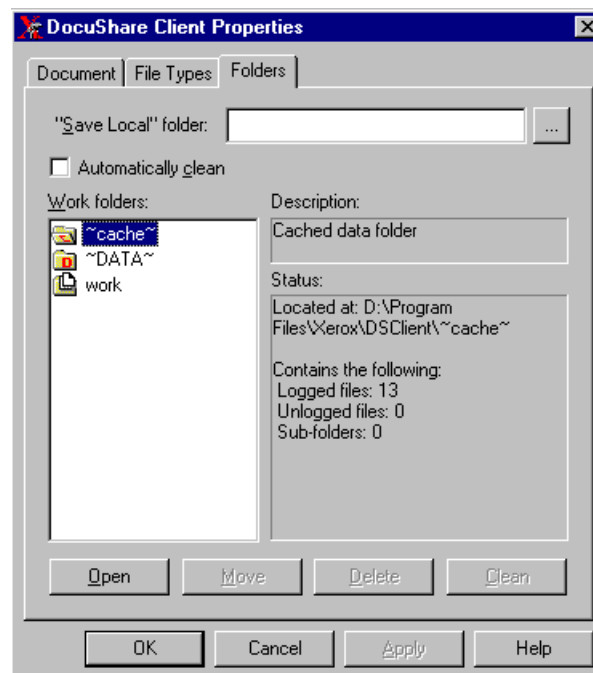
Many popular editor programs support OLE (Object Linking and Embedding) to open and track a file. For those editors, the protocol allows the editor to link with the Windows Client using the OLE file linking protocol. When the OLE protocol is in use, the Windows Client does not need to periodically query the editing state of the file. The OLE protocol is preferable to the DDE and process monitoring methods. The latter methods require the Windows Client to perform periodic state polling in the background in order to track the lifecycle of the checked out file. In NT4 and Windows 2000, Windows can provide non-OLE applications with OLE packager support. The packager enables a non-OLE application to act as if it supports the OLE file linking protocol and allows notification linkage to be established between the Windows Client and the opened file (via the packager's OLE handler).

The DDE protocol may be selected if the editor application supports the standard DDE system topic for opening a file. DDE permits an inquiry to be performed by the Windows Client about the current editing state of the file. The Windows Client makes this inquiry periodically and uses the queried information to update the file-tracking status.

If the editor application does not support any of the above methods, the Windows Client can use the Process Monitoring method to track the editor. When this method is selected, the Windows Client periodically checks the process state of the editor. However, because this method does not allow the Windows Client to track the file state itself (e.g., closure of the file window in the editor window), the Windows Client defers check-in until the entire editor application closes. This means that if the editor holds multiple file windows and you close one of the file windows, that closed file does not trigger immediate check-in. Only when you close the whole application does the Windows Client run the check-in dialog. Therefore, when this method is selected, you must exit the editor application in order to initiate a DocuShare check-in.

When you select the ODMA, custom handler, or process monitor method, you will be asked if you want to open the file using an editor program that is different from the currently assigned editor. Select **Yes** to map the file type to a different editor. A list of remappable file types will be presented. Select a desirable file type. The next time you check out a file of that file type, the Windows Client will use the remapped file type to find an editor program. Note that the Windows Client uses this file type remapping mechanism to re-assign some common file types to non-default editors (e.g., editors selected by Windows). For example, the Windows Client uses WordPad to open text (.txt) files although the default text editor is Notepad.

## **Folders Tab**



- The “Save Local folder” field sets the default folder on your PC used for storing a local DocuShare file. For example, if a checked out file fails due to a network problem while it

is being uploaded to DocuShare, the Windows Client allows you select an emergency folder to save the file locally. The folder you enter in this field will be the default for this emergency save. Use the ... button to select a different folder. If you directly edit the folder's path specification, make sure that the path is correct in syntax and that the folder exists.

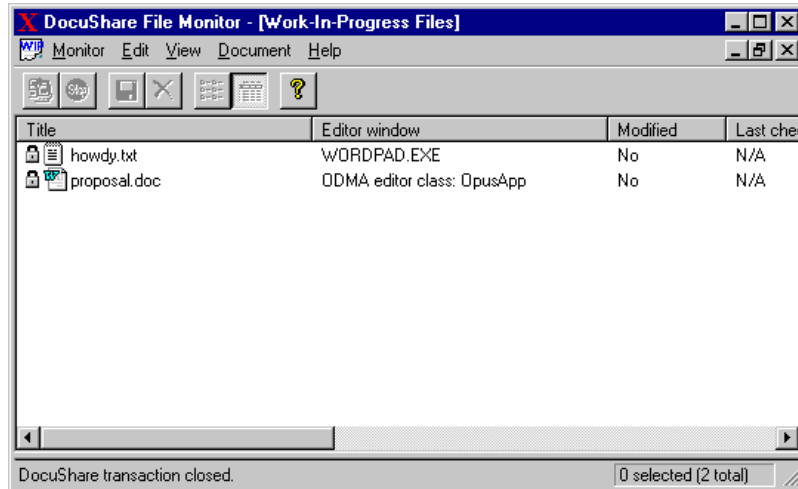
- The “Automatically clean” option tells the Windows Client to delete temporary work files it created in the cache and work folders when the current Windows session terminates. Check this option to delete temporary files.

Note that the checkbox is gray. The checked state means that the all work folders including the ODMA subfolder will be cleaned. The gray state means that all work folders except the ODMA subfolders will be cleaned. The unchecked state means that work folders are not cleaned when Windows terminates. If there are any transient or orphaned files left, they will not be deleted automatically. To manually clean work folders, use the **Clean** button.

- The icon list under “Work folders” shows the base work folders of the DocuShare Windows Client. To see subfolders, double-click on the icon or name of a folder. The folder expands to a tree of nested subfolders. A brief description and status of the selected folder is shown under “Description” and “Status” fields.
- To see the contents of a folder, select the **Open** button. The contents will be displayed using a Windows folder window. You should not manipulate (e.g., rename or delete) any of the files in the folder window unless you are certain that the file is not being managed by the DocuShare Windows Client. To verify if the file is being managed by the DocuShare Windows Client, open the DocuShare File Monitor window. If the file is listed there, do not do anything. Sometimes the File Monitor loses record of a checked-out file (e.g., due to an abnormal termination of the editor) and the working copy of the file becomes orphaned. In such a case, you may move or delete the file.
- The **Move** button lets you move the selected folder to a different location. The current location is described under the “Status” field. You can move the base work folder and cache folder; however, you are not allowed to move the data folder.
- The **Delete** button allows you to delete the selected work folder. All contents of the folder will also be deleted.
- The **Clean** button lets you clean up a work folder. Only work files that have been logged by the Windows Client will be deleted.

**Note:** These folders can only be moved or deleted if the Windows Client has not been used during the Windows Session. If you want to move or delete one of the folders but the buttons are disabled in the Settings dialog, reboot Windows and access the Settings dialog directly through the Windows Control Panel.

## View the Work-In-Progress Folder



The DocuShare Client Work-In-Progress (WIP) Folder tracks all activity in the Windows Client. The DocuShare File Monitor (displayed above) allows you to manage the contents of the WIP folder. Each file that is being edited, locked, or cached in the DocuShare Client temp directory is listed. These files can be copied directly to the local file system, unlocked, or deleted from the WIP Folder.

For diagnostics, the DocuShare Client activity log is accessible through the WIP window. A hidden pane at the bottom of the WIP window (signaled by the cursor changing above it) can be pulled up to reveal the activity log.

### Columns of the WIP list

- **Title** – Shows the document title and file type icon of the file. If the file is locked, a padlock is placed next to the title.
- **Editor window** – Shows the name of the editor's executable module, the name of the editor class, or the editor's window title.
- **Modified** – **Yes** indicates that the work-in-progress copy of the file has been modified, and **No** indicates that the local copy has not been modified since the checkout time or since the last check-in.
- **Last check-in** – Shows the time of the last check-in. If no check-in has been performed, this column shows “N/A.”
- **File handle** – Indicates the number of DocuShare file handles assigned to the file being edited. If no handle number is shown, the local file has not been checked in yet, or the file is orphaned. A file may become orphaned if the DocuShare File Monitor window was closed inadvertently while you were still editing (that is, a system error happened which caused Windows to shut down).
- **Collection** – Indicates a DocuShare collection to which the checked-out file belongs.

- **Server address** – Shows the home URL of the DocuShare server.
- **File location** – Shows the full path name of the file being edited.

### **Activity Log**

The activity log maintains a chronological listing of events that occur with regard to the DocuShare File Monitor. This activity log is in a hidden window pane at the bottom of the DocuShare File Monitor window. The activity log may be viewed by dragging the frame of the hidden window pane upwards. You can locate the upper frame of the hidden window pane by moving your cursor over the lower part of the main window. The frame will be indicated when the cursor changes into the frame drag cursor (i.e., two horizontal lines with arrows pointing vertically).

### **Monitor Menu**

- **Exit** – Terminates the DocuShare File Monitor application.

### **Edit Menu**

- **Copy** – Copies text from the activity log.
- **Clear All** – Clears the activity log.

### **View Menu**

- **List** – Shows the file titles and icons only.
- **Details** – Shows other information.
- **Settings...** – Starts the DocuShare Client Settings dialog.
- **Events** – Enables/disables activity logging (grayed when the focus is on the WIP list).
- **Refresh** – Forces rescanning of the WIP folder and updating of the WIP list.
- **Status bar** – Shows/hides the status bar at the bottom of the main window.

### **Document Menu**

- **Lock** – Locks the DocuShare file on the server associated with a selected file in the work-in-progress folder. A file checked out from Explorer is automatically locked. However, a file opened through the ODMA Interface or the Windows Open/Save As dialog may not be checked out (unless you checked the Lock option). In such a case, you may use this menu item to create the lock manually.
- **Unlock** – Unlocks the source file.
- **Save Local** – Lets you save a selected file to a local folder in your machine from the work-in-progress folder.

- **Check In** – Allows you to check in a selected file. If the file is not assigned with a file handle, the file may only be uploaded as a new document.
- **Stop** – Cancels an ongoing upload process.
- **Delete** – Deletes the local copy from the work-in-progress folder. If the source file is locked, deleting will remove the lock.

## **Help**

- **Contents** – Allows you to view the file.
- **About DocuShare Client...** – Enables you to view the version information for the DocuShare Client.

## **Buttons**

- **Check In** – Allows you to check in a selected file. If the file is not assigned with a file handle, the file may only be uploaded as a new document.
- **Stop** – Cancels an ongoing upload process.
- **Save Local** – Lets you save a selected file to a local folder in your machine from the work-in-progress folder.
- **Delete** – Deletes the local copy from the work-in-progress folder. If the source file is locked, deleting will remove the lock.
- **List** – Shows the file titles and icons only.
- **Details** – Shows other information.

## **Remarks**

The DocuShare File Monitor lists all files that are currently held in the work-in-progress folder. You can use the monitor window to find or review what files have been checked out and what states those files are in. For example, you may see that a file was last checked in at 4:00 pm and is still being edited using Microsoft Word. You do not need to start the DocuShare File Monitor manually – it will be started automatically when you check out a document the first time. The DocuShare File Monitor window is usually hidden from view. To view the work-in-progress list, double-click on the DocuShare File Monitor icon on the taskbar.

When you check out a DocuShare file via the Windows Explorer, a copy of the file is downloaded to a work-in-progress directory and is indexed by the DocuShare File Monitor for editor tracking and check-in purposes. After it locks the file, the DocuShare File Monitor starts an editor program associated with the document type of the file. When you close the edited file or exit the editor program, the DocuShare File Monitor prompts you to save the file back to DocuShare. You may fill in optional fields and click on **Check In** to start the upload process. At this point, you may decide to save the file as a new document in DocuShare instead of

saving it back as a new version of the checked out file. If you do, select **Save As**, and you will be prompted with a new document check-in form.

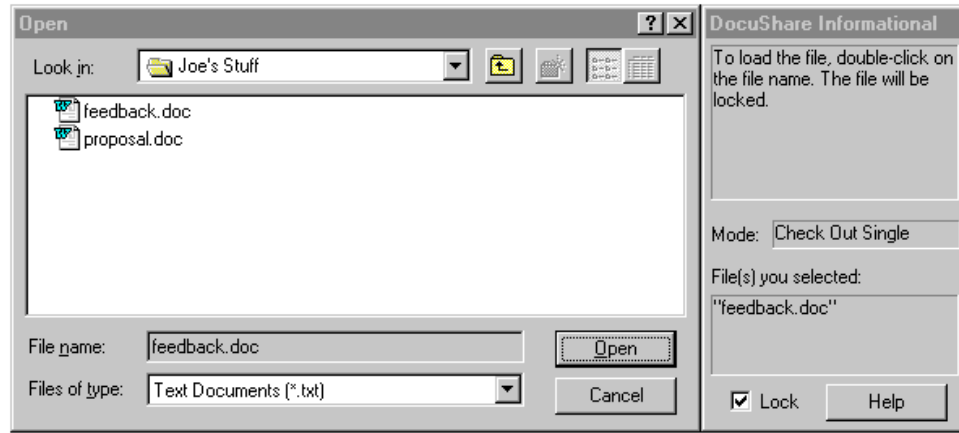
If you do not want to save the file (despite the edit changes you made), select **Cancel**. The DocuShare File Monitor invalidates the file handle assigned to the canceled local file. The DocuShare File Monitor then asks you if it is OK to delete the local copy that you were working on. If you want to keep the file, select **No**. If the WIP folder is not open, it will then open. Highlight the file in the list, and select **Save Local** from the Document menu (or from the tool bar). You may also select **Check In** to save the file as a new DocuShare document. Remember that, once you cancel, the original file handle is lost. You cannot save it back as a new version of the checked out file. If you still need to save it as a new version, follow these steps: Save the file to a local directory using **Save Local**, start Explorer, go to the file to replace, select **New>Version** from the context menu, and open the local file you saved.

Another note regarding check in cancellation: The DocuShare File Monitor leaves the file locked when you cancel. Should you decide to save it to a local folder, be sure to either unlock the file or delete it using the respective menu items of the DocuShare File Monitor. The DocuShare File Monitor will notify Explorer of a lock status change for display updating. Although a canceled file may be unlocked from Explorer, you will continue to see a padlock in the WIP folder because the DocuShare File Monitor is not notified. When you delete the file, the DocuShare File Monitor displays an error message indicating that the unlock failed.

You do not need to close a checked-out file (or exit the editor program) to initiate a check-in. If you want to save an interim version, you can do so by first selecting **Save** in the editor and then by selecting **Check In** from the DocuShare File Monitor. Note however, that depending on how the editor manages an open file, the file may be marked non-shareable, and the **Check In** command may fail.

To close the DocuShare File Monitor window, either click on the (X) close box at the upper-right hand corner or select **Close** from the system command menu (right-click on the DocuShare File Monitor title bar to get this menu). Under normal circumstances, you should not select **Exit** from the Monitor menu. The DocuShare File Monitor application exits automatically when the Windows session is shut down, restarted, or a new user logs in.

## ***Open/Save/Save As... Dialogs***



Desktop applications that support the Window's Common Dialog will have access to DocuShare through their Open and Save/Save As... dialogs. The DocuShare folder can be selected and the DocuShare collection hierarchy can be traversed. An informational side box is presented to help navigate through DocuShare. The **Mode:** field notes whether the action will result in a check-in, check-out (lock and open), or browse.

### **About Controls**

**Top area** – Displays Help text regarding what to do, depending on the currently selected item.

**Mode** – Indicates file access mode and data direction depending on the currently selected item. Possible modes are:

- Select server – open the selected server folder.
- Open collection – open the selected collection.
- Browse – open the selected file without locking it.
- Check out – open the selected file and lock it.
- Check in document – check in a file as a new document in DocuShare.
- Check in version – check in a file as the latest version of a DocuShare document.

**Files you selected** (bottom area) – Shows the name(s) of the selected item(s).

**Lock** (check box) – Check to lock the selected file. Available in the Open mode. Grayed in the Save mode. Note that this option is pre-selected by the “Lock Common Dialog opened files” option in the DocuShare Windows Client Properties dialog.

**File name** – User specifies the title of a document to open or save. The file name field is grayed when in the Open mode. A file must be selected from the directory list. The name field becomes editable in the Save mode. When viewing a DocuShare collection, the field is grayed regardless of the mode.

**Files of type** – User specifies a file type. The types are made available by the editor program.

**To check out an existing file for editing from DocuShare and then save it back:**

1. Select **Open** from the File menu of the editor application.
2. Navigate to the DocuShare folder.
3. Go to the DocuShare collection that holds the file. If you have not logged onto the server, you will be prompted to enter a password.
4. Check the Lock option located in the DocuShare Informational box. If you do not want to lock the document, leave it unchecked.
5. Select the file. The **Mode:** line should read “Check Out Single” (or “Check Out Multiple” for multiple file selection). In addition, the “Files you selected” area should mention the file you just selected.
6. To load the file into the editor, click on **OK** or double-click on the file name.
7. The DocuShare Client downloads a copy of the file from the server (locking it if you enabled the Lock option), and places it in a work-in-progress folder. To view the document's work-in-progress status, double-click on the DocuShare File Monitor icon in the system tray. The WIP folder opens to show files that have been checked out and/or are currently being edited.
8. Make your changes. While editing, you may select **Save** from the File menu. Note that Save writes out the changes you have made to the local copy of the file in the work-in-progress folder. It does not cause an actual check-in with the server.
9. To save the file back to DocuShare, select **Close** from the File menu.
10. DocuShare Client produces a form for checking in a new document version. This may take a few moments.
11. Fill in optional revision comments in the Version Comment field.
12. Click on **Check In**.
13. The DocuShare Client uploads the modified copy of the file with your comments and unlocks the file.
14. Once the document is saved back, the DocuShare Client deletes the local copy from its work-in-progress folder.
15. If you view the document history in Explorer, your latest version appears in the list. Note that two new versions appear if you have made two check-ins, one from the first Save and the other from closing the document window.

*Note that while browsing DocuShare collections, the file name field of the Open dialog is grayed. You are not allowed to type an arbitrary file name. You must select a name from the shown list.*

**To save a local file to DocuShare:**

1. Load the document into the editor. Make your changes.
2. Select **Save As** from the editor's File menu.
3. In the Save As dialog, navigate to a destination DocuShare collection.
4. The Mode description should read "Check In Document."
5. Type in a file name. If you have selected a name from the list shown previously, de-select it by clicking somewhere in the blank area. The "Files you selected" area should be blank.
6. Click **OK**.
7. Your editor program saves the file to a work-in-progress folder of the DocuShare Client. The document appears in the Work-In-Progress Files list of the DocuShare File Monitor window.
8. The DocuShare Client produces a form for checking in a new document. This may take a few moments.
9. Fill in the summary and other optional fields.
10. Click **Check In**.
11. The DocuShare Client uploads the new document to the server.
12. You may continue editing. If you do, however, you should lock the document from the DocuShare File Monitor window. The Save As mode does not lock the checked-in document automatically.
13. Close the document. If the document has been modified since the first check-in, the DocuShare Client again prompts you with a check-in form.
14. Once the document is saved, the DocuShare Client deletes the local copy from its work-in-progress folder.

*If an error occurs while uploading the file, or if you cancel the upload in progress, DocuShare Client prompts you to open the DocuShare File Monitor window (if not already open), review the status, and take action if necessary to resolve the problem. From the DocuShare File Monitor window, you may attempt to check in again, or save to a local folder on your machine. If you have already closed the editor application, you should also delete the finished file from the work-in-progress list. Note that when you exit from Windows, all leftover work-in-progress files are deleted automatically.*

**To overwrite an existing DocuShare document with a new version:**

Follow the steps for saving a local file to DocuShare. Instead of typing a new name in the Save As dialog, however, select an existing name from the list. The Mode line should read “Check In Version.” In addition, the “Files you selected” area should display the name you selected.

**Limitations**

You may not save a file in the DocuShare Client root folder or in any server folder. An error will result.

After you check out a document, you may want to save it as a different DocuShare document. You can do this by following the above procedure for saving a local document. However, because of the way that the DocuShare Client tracks the document's location, the original document continues to be shown in the DocuShare File Monitor window after it is saved as a new document. If you have edited and saved the original document again after the initial check-in, when you close the second document (the new one that you created with the Save As dialog), you may be prompted for checking in not only the second document, but the original document as well. Should this happen, you can either continue with the check in, or let the DocuShare Client discard the original.

When you use the Open or Save As menu the second time, the dialog box may show the current contents of a previously accessed work-in-progress folder of DocuShare Client (e.g., Temp\_Folder\_C-123). While nothing prevents you from doing so, you should not open a file from or save a new one to that folder. The folder is temporary and is used by the DocuShare Client for storing work-in-progress files that are mapped to a certain DocuShare collection. If you do save a file (by mistake) into this temporary directory, DocuShare Client asks you if you want to check it in. If you say yes, your file will be uploaded. However, doing so causes the DocuShare Client to not receive notification regarding the editor window's identity. This leads to a condition where a directly saved file is never removed from the Work-In-Progress Files list even after the editor window is closed. You need to manually remove it. To do this, open the File Monitor window and execute Delete from the Document menu.

Non-standard functions are not supported. Some editor applications add custom buttons and/or other controls to the Windows Open/Save As dialog box. The DocuShare Client does not support them. Use of such a function may lead to an error.

Some of the buttons in the dialog box are grayed when browsing a DocuShare server. Specifically, the Create New Folder button and the two List and Details buttons are grayed. To use these functions, right-click to pop up the context menu, and select the respective items.

Some context menu items that are available in Explorer are not available in the Open/Save As dialog. They include Add Document, Lock, and Unlock.

You can find the complete list of tested applications that work with the DocuShare Client through the application's Open/Save As dialogs in the README documentation. An application not listed may not work correctly.

## 12 DocuShare ODMA Client

### [Overview](#)

### [Opening a DocuShare File Using the ODMA Client](#)

### [Checking In an Edited File to DocuShare](#)

### [About DocuShare Document Titles, File Names, and File Extensions](#)

### [Maximum Number of ODMA-Managed Documents](#)

### [Supported Applications and Known Problems](#)

### [Differences Between the Common Dialog and ODMA Interfaces](#)

### Overview

The Open Document Management API (ODMA) Client works in conjunction with the Windows Client and Windows Explorer to make managing your documents easier. With the DocuShare ODMA interface, you can access DocuShare from within the editor application you use. In other words, the ODMA Client allows DocuShare to be one of the locations from which you can open files and to which you can save files.

### Opening a DocuShare File Using the ODMA Client

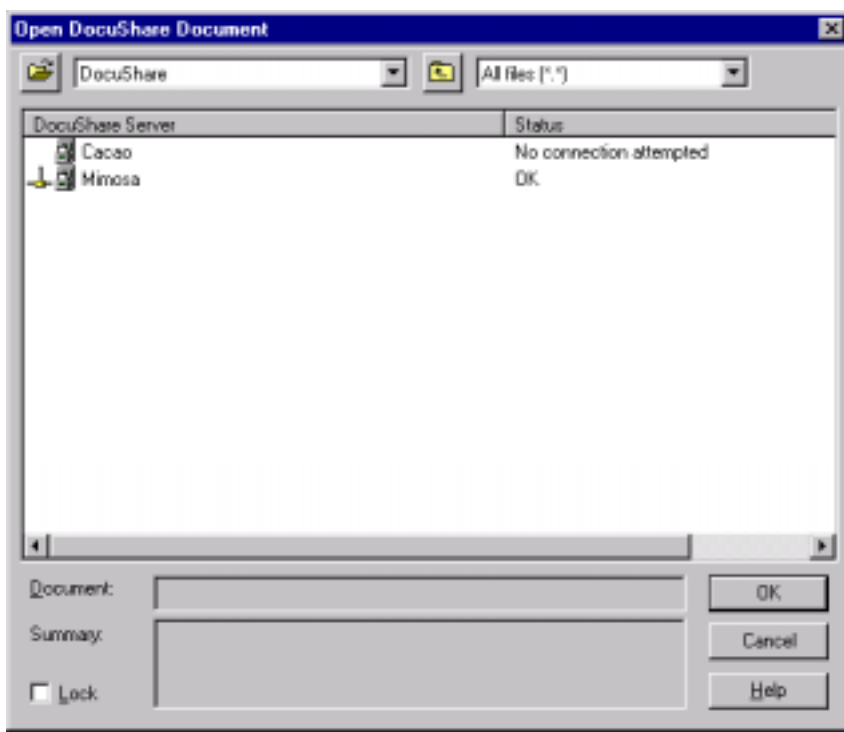
The ODMA Client also allows you to open a DocuShare file through an editor application. Using Microsoft Word as an example editor program, follow the steps below.

**To open a file in DocuShare using ODMA:**

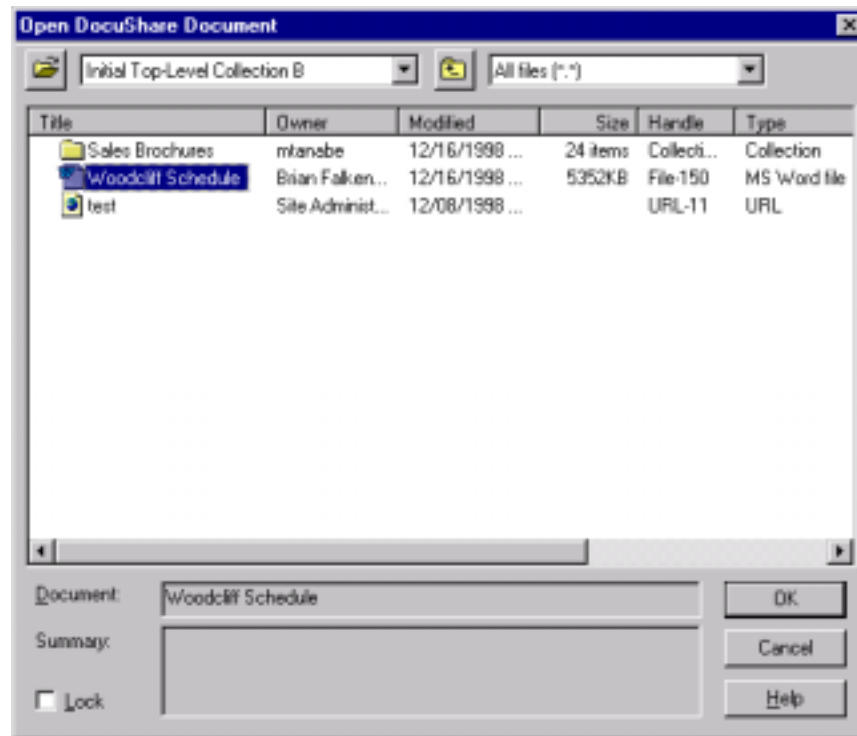
1. Choose **File → Open** in Microsoft Word and the **Open DocuShare Document?** dialog box will appear.



2. If you choose **No**, the standard Microsoft Word **Open** dialog box appears, allowing you to browse Windows Explorer to select the file you wish to open. If you choose **Yes**, a dialog box for DocuShare opens as shown below:



3. Select the DocuShare server you wish to browse. If you have only one server, select that one. The collections on that DocuShare server will then appear in the next dialog box. If you are not already logged in, you will have to enter your User Name and password when prompted.



4. Browse the collections/folders until you find the folder you want to edit, and double-click the file to open it. You have now checked the file out of DocuShare. Think of it as borrowing the file.
5. If you checked the **Lock** checkmark, DocuShare will lock the file and load it into Microsoft Word. You can then edit the file as you wish.

**Note:** Remember, when editing a DocuShare file in an editor application (e.g., Microsoft Word), you are not actually editing the file on-line in DocuShare. Therefore, using the **Save** command while editing a file does **not** save the file back to DocuShare. **Save** will only save the file to your local computer. You must use **Close** or **Save As** to upload the file back to DocuShare. See the next section for more information.

You can also open a DocuShare file through Explorer by double-clicking on the file (or selecting **Check Out** from the **right-click** menu), and thereby launching the editor application from Explorer.

### About Controls

- **File Open button** – Takes you back to the application's native Open (or Save As) dialog.
- **Left drop-down list** – Lists the currently browsed collection, its parent collection, and so on.
- **Up One Level button** – Takes you back to the parent collection.

- **Right drop-down list** – Lists the supported ODMA file types. Select a specific type to limit the file listing to files of that type only.
- **Document** – Specifies the title of a selected document.
- **Summary** – Displays the summary text attached to a selected document in the Open mode, or lets you enter summary text in the Save mode.
- **Lock checkbox** – Enabled for Open only. Locks the document on DocuShare and opens the document for editing; otherwise, the document is opened for browsing only (i.e., Read-Only mode).

### Checking In an Edited File to DocuShare

When you are finished editing a document using the ODMA Client, you may save the file locally on your computer, or check the updated file back into DocuShare. Think of checking the file in as returning it. **Save** alone will **not** check the file back in to DocuShare. Follow the steps below to check in an edited file to DocuShare.

#### To check a file back into DocuShare:

1. Select **Close** to close the edited file.
2. You will be prompted as to whether you want to save changes. Choose **Yes** (unless you do not want to save changes). The **Check In Updated Document** dialog box appears:

**DocuShare - Check In Updated Document**

Title: Woodcliff Schedule

Summary:

Owner: Brian Falkenhainer

Version Comment:

File name: Document1.doc

Handle: File-150

Check In Discard Save Local

3. Click on **Check In**. Enter any version comments you wish in the corresponding field.  
**Note:** You can choose the **Save As** option to give the updated file a new name on DocuShare, or you can cancel.
4. You will see an updating dialog box appear as the document gets uploaded to the DocuShare server. The updated file is now checked back in to DocuShare with any edits you made.

The **Discard** button will unlock the file and discard the edits. The **Save Local** button will allow you to save the file to the local file system. In either case, the file stored in DocuShare will not be affected.

### **About DocuShare Document Titles, File Names, and File Extensions**

When you type a name in the Save DocuShare Document dialog to save a file, you are actually giving the file a DocuShare “title.” DocuShare maintains another file property called “file name.” The DocuShare Client does not actually use the file name. Rather, when the DocuShare Client needs a file name to make a file transfer (in Explorer for example), it generates a path name that concatenates the work-in-progress directory path, the DocuShare title, and the extension part of the DocuShare file name. It then runs the resultant path name through a validation routine to remove any illegal characters, and to curtail the name length to within the range that Windows permits.

In the Save DocuShare Document dialog, you may or may not specify a file extension as part of the title. If you do not, the DocuShare Client automatically uses a file extension name associated with the editor application you are using. The DocuShare Client then generates a “file name” by concatenating the title you supplied with either the extension you supplied as part of the “title” specification, or the extension it generated. You see this generated file name in the **File name field** in a check-in dialog box. For example, if you save a Word 97 file and call it “Business proposal” without specifying any extension, the file name that is generated is “Business proposal.doc”.

A problem arises if you try to save a file of a non-standard type. For instance, you may save a Word template file and call it “Entry automation macro.” The file should be given the extension “.dot”. However, because the DocuShare Client always uses the same file extension for a given editor (in this case, “.doc” for Word), the template file would be given the incorrect extension of “.doc”. When you see the file name in the check-in dialog, it reads “Entry automation macro.doc”. In such a case, you need to edit the file name in the check-in dialog and assign the correct extension name before selecting the Check In button. You can avoid this problem if you first type “Entry automation macro.dot”. The DocuShare Client simply copies the title to the file name field and the correct extension will be forwarded to the server.

If you have missed the chance to correct the extension, you can:

1. Open the collection in Explorer.
2. Drag and drop the file onto a local folder in your machine.

3. Correct the extension name.
4. Copy it back to the collection.

Simply renaming the title from inside the collection view is not enough. Doing so will not affect the file name including the extension. In addition, when you do this in Explorer, make sure you can see the file extension. If the extensions are not displayed, use Explorer's Options to correct the view settings.

### ***Maximum Number of ODMA-Managed Documents***

An application working with the DocuShare Client via ODMA may open up to 16 documents (in practice, this number is 14 or less because several of the document slots are used for transient purposes). If you are a user of a Corel 8 application, you will not be able to consecutively open and/or save a document more than 14 times within the lifetime of the application's process. If you attempt to open more, the DocuShare Client will alert you when you have reached the limit. Restarting the application will clear this effect (the document counter is reset).

### ***Supported Applications and Known Problems***

Refer to the README documentation.

### ***Differences Between the Common Dialog and ODMA Interfaces***

Although the Windows common dialog interface of DocuShare Client is similar in functionality to the DocuShare Client's ODMA interface, the check-in and check-out processes are controlled differently. Because of this, you may encounter a check-in prompt from the ODMA interface at an unexpected time. For instance, the common dialog interface does an actual check-in and uploads the file to the server when you perform a Save As. The ODMA interface, on the other hand, defers the actual check-in and upload of the file until you close the document.

## 13 **PaperPort Link to DocuShare**

[Overview](#)

[PaperPort Preferences](#)

[Upload Parameters](#)

### **Overview**

The PaperPort Link to DocuShare is a plug-in for the popular Visioneer PaperPort Desktop that is bundled with many desktop scanners. The Link is available for download from the DocuShare HelpDesk. It is a self-contained installer that does not require the DocuShare Windows Client to be previously installed.

If you are familiar with PaperPort desktop links, the actions for using the DocuShare plug-in will be easy to identify and use. Items, usually documents, normally appear on the PaperPort desktop as the result of a scanning operation. In Xerox DocuCentre systems, the Scan-to-File facility can place items on the PaperPort desktop. Once on the PaperPort desktop, items can be processed by dragging them onto one of the link icons on the link bar displayed at the bottom of the PaperPort Desktop. Installing the PaperPort Link to DocuShare creates its own link icon. For more information on the PaperPort Desktop and links, refer to the online help for the PaperPort Desktop and the online help for the PaperPort Link to DocuShare for more information.

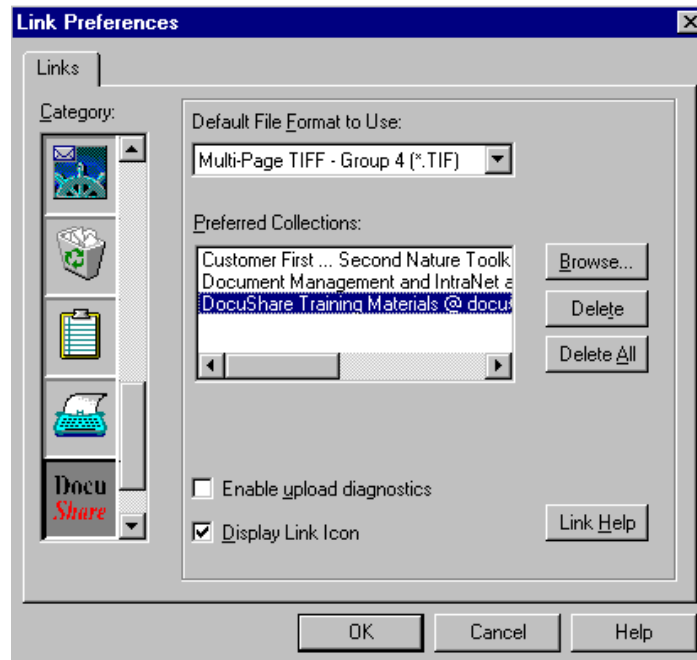
The PaperPort Link to DocuShare allows items to be uploaded directly from the PaperPort Desktop into DocuShare. Items in DocuShare can not be retrieved back to the desktop through the Link. If installed on a machine with the DocuShare Windows Client, mapped DocuShare servers will be accessible and shared by both the Link and Windows Client.

The PaperPort Link to DocuShare has two dialog window boxes, **Link Preferences** and **Upload Parameters**. Each has its own Help information.

### **PaperPort Preferences**

**To view the PaperPort Link to DocuShare Preferences:**

1. Right-click on the DocuShare Link and select **Preferences** in the pop-up window to open the Link Preferences window.



2. Set the default format for the files to be uploaded to DocuShare.
3. Specify the more frequently used Collections to upload files to. These Preferred Collections will be available for quick selection from the Upload dialog.
4. Logging can also be enabled from the Preferences Dialog.

## Upload Parameters

**To upload a file to DocuShare:**

1. Drag a document from your PaperPort Desktop and drop it onto the DocuShare Link to open the Upload Parameters window.

2. Specify whether the file should be uploaded as a new file or as a new version of an existing file.
3. If uploading as a new file, select the Collection for the file to be uploaded to from among the Preferred Collections. If you don't see the Collection you want, use the Browse button to connect to the server and select it. If uploading as a new version, use the Browse button to locate the file you wish to update.
4. Fill in the title, author, summary, and keywords fields for the new file.
5. Specify what format of the file should be uploaded.
6. Press **OK** to start the upload.

## 14 Troubleshooting DocuShare

Below are some common usage questions or problems and suggested solutions. For other questions not addressed here, or late breaking information, please consult the [End User FAQ](http://www.xerox.com/products/docushare/faqs.html) at <http://www.xerox.com/products/docushare/faqs.html>.

Problem	Solution
I can't create an account on DocuShare.	Your Site Administrator may have restricted account creation to either other DocuShare users or to the Site Administrator. Contact your DocuShare Site Administrator.
I can't log in to DocuShare.	<p>Make sure you are using a browser that supports logging in to a system. Use Internet Explorer 2.0 or higher, or Netscape Navigator 2.0 or higher. Also be sure that this browser supports cookie files and that cookie files are enabled for your browser.</p> <p>Some users report this problem when their browser is not set to refresh the page with every visit to the page. In those cases, they are actually logged in and are seeing out of date pages.</p>
I forgot my DocuShare user name.	View your User Services. Your user name will be displayed there. You can view the User Services page even if your are not logged in.
I forgot my DocuShare password.	Do not create another user account. Call your DocuShare Site Administrator to reset your password.
When I try to add a file to DocuShare, I do not see the <b>Browse</b> button that I need to use to locate the file.	You are not using a browser that supports the file upload standard. Install the <b>DocuShare File UpHelper Application</b> . Also adjust your <b>Use Helper for Upload</b> User property.
I have the DocuShare File UpHelper Application installed on my computer, but when I click the <b>Add File</b> button, the UpHelper does not start. Instead I get the Create File page.	Adjust your <b>Use Helper for Upload</b> User properties. To ensure use of the UpHelper, set that user property to either <b>Always</b> or <b>When Necessary</b> .
I have the DocuShare File UpHelper Application installed on my computer, but when I click the <b>Add File</b> button, I get a dialog box that tells me that my	<p>Your browser is not configured to recognize the UpHelper Application.</p> <p>If you are using Internet Explorer, reinstall the UpHelper application and select <b>Yes</b> when the installation program asks to configure your browser.</p> <p>If you are using Netscape, you must manually configure your</p>

browser doesn't know what to do with the program.

browser to recognize UpHelper.

The Netscape window hangs when I try to upload a file into DocuShare.

Check to see if the file is open in it's associated application (for example, Word or PowerPoint). If it is, close the file in its editor and try the upload again. (This is a suspected bug in the Netscape-Windows interaction.)

I uploaded a file into DocuShare. Everything seemed to work properly, but my file is not there.

Check your browser's proxy settings. You should not be using a proxy server to access your DocuShare server.

I uploaded a file into DocuShare and received an error saying it had an invalid index or was unable to open the collection.

If you return to the collection into which the file was being added, you should find that the file was correctly uploaded. If so, the problem was with the search indexing step that occurs after your file has been uploaded. The file is stored but not indexed. Contact your Site Administrator to report the problem.

When I click on the title of a file in DocuShare, I get the message "Unknown File Type - You have started to download a file of type application/...."

Make sure your browser is configured to use a helper application to view this type of file.

I am using Internet Explorer. When I click on a PDF file in DocuShare, I just get a blank page. The file does not seem to open.

This is a known interaction problem between the Internet Explorer browser and Acrobat (PDF) files. Contact your Site Administrator for assistance.

I added HTML markup to an object's properties and now the page won't display properly.

DocuShare allows you to put HTML markup in text-based properties such as an object's Description or Summary. You should limit use of HTML to simple formatting commands like font changes and lists. Including header commands like <HTML>, <HEAD>, or <BODY> will most likely interfere with DocuShare's own HTML commands, leaving a page that is either blank or very poorly formatted. You should also avoid using any markup in Title and Summary properties that affects the vertical layout, such as IMG and list directives, because those two properties are displayed in contexts that assume simple strings.

I can't find something I'm looking for in DocuShare.

There are a variety of techniques for quickly locating content. These include:

- Using the advanced Search tools to describe the content.

- Using the What's New? Feature if you know the content was recently added.
- Using the Contents feature to get a view of a collection's contents that is several levels deep.

I am logged in and I need to access a DocuShare object, but when I do, I get a message that says "Not Authorized."

Contact the owner of that object to have them extend Reader access permission to you.

I accidentally deleted a collection without deleting the objects it contained. I can't find those objects.

The objects from the collection are still in the DocuShare database. You can directly access an orphaned object if you know its unique address (for example, <http://sales.acme.com/dscgi/ds.py/Get/File-128>). Otherwise, call your DocuShare Site Administrator to locate an orphaned object.

I moved a collection to a new location. Now I can't find the collection in the new location or the old location.

You have accidentally orphaned the collection. The collection is still in the DocuShare database. You can access it if you know its unique address (for example, <http://sales.acme.com/dscgi/ds.py/Get/File-128>). Otherwise, call your DocuShare Site Administrator to locate an orphaned object.

I thought I deleted an object from a collection in DocuShare, but when I navigate to the collection page I still see the object.

If you are using the browser Back button, Go list, or Bookmarks to navigate, you may have accessed a cached version of the collection page. Click **Reload** in the browser to refresh the page.

I logged in, moved through the DocuShare site and then used the Back button on my browser a few times. Now my logged in status says I'm **Guest**?

You have accessed a cached version of the collection page. Click **Reload** in the browser to refresh the page and your login status.